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Ohio State Bar Association (OSBA) OnDemand Bundles give you the power of choice, optimal value and flexibility. Bundles allow you to easily meet your continuing legal education (CLE) requirements. Abundant content offerings provide the option to deepen your practice area of expertise or expand your knowledge base and learn something new. With the added flexibility of OnDemand viewing, bundles allow you to meet your CLE needs at your leisure!

The Estate Planning, Trust and Probate Law Bundle offers 15.5 self-study credits, including Professional Conduct and Specialization hours, and is available to OSBA members for \$159 and to nonmembers for \$199. An economical purchase for everyone, OSBA members receive the optimal savings of almost \$500 off original program pricing, and the low cost per credit hour of just \$10.25.

For the A-L reporting group*, you can effortlessly meet your requirements with two bundles, maximizing flexibility and value. View additional OnDemand bundle offerings at OhioBar.org/2021-Bundles.

To purchase this bundle, visit OhioBar.org/21-estateplanning-bundle. You will be directed to the product in our CLE Store, where you can complete your purchase. Credits are 1.0 hour per course unless specified, and all courses must be completed by Friday, Dec. 31, 2021, at 11:59 p.m. ET. Questions about OnDemand Bundles? Contact the Member Service Center at (800) 232-7124.

 = Approved for Professional Conduct  = Approved for Specialization Certification

The Attorney-Client Privilege: Three's a Crowd? Considerations for Estate Planning Attorneys **Qualifies for Estate Planning, Trust and Probate Law Specialization**

Who is the client? Is it only the individual with whom a lawyer has a written or oral agreement to represent, or could it extend to the client's spouse, neighbor or friend? Many lawyers have been in situations where clients bring their trusted confidants and loved ones to meetings, but does the privilege apply to everyone in the room? When does the attorney-client privilege attach to these communications, and when is the privilege waived by the presence of a third-party? Our speaker will review the best practices to ensure attachment of the attorney-client privilege in instances where a client identifies an agent to act on their behalf.
Mark M. Mikhael, Esq.; Schneider Smeltz Spieth Bell LLP; Cleveland

Review of Ohio's New LLC Statute **Qualifies for Estate Planning, Trust and Probate Law Specialization**

Ohio is completely rewriting its LLC statute for the first time since being adopted in 1994. The program will review the changes selected under Ohio's new, modern LLC statute and discuss practical considerations for structuring and drafting operating agreement provisions.
James M. Gianfagna, Esq.; Schneider Smeltz Spieth Bell LLP; Cleveland

Termination of Trusts **Qualifies for Estate Planning, Trust and Probate Law Specialization**

In this program, attendees will learn how to terminate a trust before the event or time stated in the trust terms while minimizing the liability exposure of the trustee (who deviates from the terms) and the beneficiaries, both beneficiaries who receive more than the settlor provided for them and who are thus shorted.
Robert M. Brucken, Esq.; Probate Law Journal of Ohio; Cleveland

Bitcoin and Estate Planning

An introduction to technology and estate planning implications of cryptocurrency, focusing on Bitcoin. This course will look at how blockchain-based cryptocurrency was created and became an unexpected and disruptive force in the market. Attendees will also learn about the current regulatory landscape with Bitcoin, focusing on the tax guidance from the IRS and what tools and traps exist for clients and estate planners when addressing Bitcoin as an asset.
Christopher Orr, Esq.; AlerStallings LLC; Newark

Our Mission and CLE Philosophy

It is the ongoing mission of the OSBA to promote justice and advance the legal profession. We advocate for Ohio lawyers and legal professionals and equip them with the tools, resources and CLE they require to represent their clients and the profession successfully.

As the leading provider of CLE in Ohio, OSBA programming is held to the highest standard. Our objective is to deliver content for numerous practice areas, presented by knowledgeable and engaging speakers on a variety of topics and in multiple formats and time increments to provide options and flexibility for the busy legal professional's schedule.

Disclaimer of Interest and Other Undesired Transfers

This program will cover disclaiming testamentary and non-testamentary succession of interest to real property, as well as the logistics of rectifying an otherwise undesired transfer.
Alina V. Dukstansky, Esq.; Alina Law LLC; Chagrin Falls

Making Use of Private Trust Companies **Qualifies for Estate Planning, Trust and Probate Law Specialization**

The program speakers will provide an overview in making use of private trust companies.
Cindy L. Steeb, MBA, JD; President & Founder, CLS Consulting, LLC; Cleveland

Exploring Offshore Trust Jurisdiction **Qualifies for Estate Planning, Trust and Probate Law Specialization**

In this webcast, our speaker covers exploring offshore trust jurisdiction.
William A. Ensing, Esq.; Ensing Law Firm; Lake Forest, Ill.

Estate Procedures and the Initial Forms

This course will provide an overview of the different estates in Ohio probate courts and an introduction to the initial forms to get started on an estate.
Chad M. Draheim, Esq.; Artz Dewhurst & Wheeler LLP; Columbus

Crisis Management in an Echo Chamber: Using Social Media to Defend Your Reputation

Social media has become a primary information source and dominant driver of the reputation of individuals and organizations. Experience has shown that the more forthright an organization responds to situations on social media, the more likely it is that they will neutralize damage to their reputation and brand. This webcast places a heavy emphasis on pragmatic, practical tools you can use to help your clients or your law firm succeed on social media.
Thomas J. Fladung; Hennes Communications; Cleveland

Multigenerational Trust Planning: Thinking Out of the Box **Qualifies for Estate Planning, Trust and Probate Law Specialization**

Learn the importance of standard trust provisions and trustee options when planning and drafting trusts in perpetuity. **(3.0 CLE hours)**
Cindy L. Steeb, MBA, JD; President & Founder, CLS Consulting, LLC; Cleveland

Surviving and Thriving: A Workshop on How to Protect Yourself While Helping Those in Need

Repeated exposure to our client's trauma and listening to their pain can take a toll on even the strongest healthy professional. It can negatively impact our work, our relationships with others and our overall view of the world. Attendees will learn to recognize the difference and impact of secondary trauma, compassion fatigue, stress and burnout, the importance of resilience and self-care, including helpful self-care techniques.
Megan R. Snyder, MSW, LISW-S; Ohio Lawyers Assistance Program, Inc.; Columbus

Substance Abuse and Ethics

A discussion on the scope of substance abuse issues in the legal profession, this program will use real examples, share common causes and prevention of substance abuse and review how to detect possible abuse. Attendees will understand how the rules governing attorney conduct relate to substance abuse, how those rules are used in both disciplinary matters and attorneys' rehabilitation. Resources for treatment alternatives will be made available to attorneys suffering from substance abuse and other important thoughts on this critical issue for lawyers.
Jane Gleaves, Esq.; Kegler Brown Hill + Ritter; Columbus

New Rules of Practices and Procedures

On July 1, 2020, significant amendments to the Ohio Rules of Civil Procedure took effect, and these amendments aligned the Ohio Rules with the Federal Rules of Civil Procedure. Our speakers will discuss the impact of these amendments on your practice.
Susan M. Audley, Esq.; Tucker Ellis LLP; Cleveland
Gretchen Koehler Mote, Esq.; Ohio Bar Liability Insurance Company; Columbus

The Secure Act: An Update for Estate Planning for Retirement Accounts **Qualifies for Estate Planning, Trust and Probate Law Specialization**

More than a year has passed since the implementation of the SECURE Act. During this webcast, you will learn which SECURE Act changes became effective as of January 1, 2021, what we have learned one year into the enactment, what guidance we still await and how this impacts family estate planning and retirement accounts. **(0.5 CLE hours)**
Melissa Spiveack, Esq.; Dinsmore & Shohl LLP; Cincinnati

*Per the Supreme Court of Ohio, the self-study cap has been waived for judges, magistrates and attorneys in the A-L reporting group. CLE requirements can be completed through any combination of approved self-study or live courses (including live interactive webinars).
 Note: This OnDemand Bundle exceeds the 2.5 Professional Conduct hours, and the overage will convert to general hours. OnDemand CLE Pass credits cannot be used to purchase OnDemand Bundles.