

SCHENECTADY COUNTY BAR ASSOCIATION

Trusts and Estates/Elder Law Seminar

Thursday, May 19, 2022 – Union College, College Park Hall, Schenectady

5.0 CLE hours with 3.0 in areas of practices; 1.0 in professional ethics and 1.0 in diversity, inclusion and elimination of bias

- 8-8:30 a.m. **Registration and continental breakfast**
- 8:30-8:40 a.m. **Welcome**
Lauren E. Sharkey, Esq.—Cioffi · Slezak · Wildgrube P.C.
Deborah A. Slezak, Esq.— Cioffi · Slezak · Wildgrube P.C.
- 8:40-9:30 a.m. **Elder Law Update (1.0 CLE)**
A review of current Medicaid rules and regulations; discussion of Medicaid changes regarding elimination of resource test and proposed planning options and possibilities; how to address the potential of losing benefits when the recertification process begins again
Tara Anne Pleat, Esq.—Wilcenski & Pleat, PLLC
- 9:30-10:20 a.m. **Case Update**
A review of recent cases including nursing homes suing responsible parties and Queens County case regarding digital will signings
JulieAnn Calareso, Esq.—Gleason Dunn Walsh & O'Shea
- 10:20-10:30 a.m. **Break / Sponsor Presentations**
- 10:30-11:20 a.m. **Chief Clerks on Surrogate's Court Practice (1.0 CLE)**
Deborah S. Kearns, Esq., Albany County Surrogate's Court
Amy Stone, Schenectady County Surrogate's Court
- 11:20 a.m.-12:10 p.m. **Ethics (1.0 CLE - ethics)**
Ethical considerations in estate planning and administration
Monica A. Duffy, Esq.—Attorney Grievance Committee, Third Judicial Department
- 12:10-1:10 p.m. **Lunch / Sponsor Presentations**
- 1:10-2:00 p.m. **Estate Planning for the Modern World (1.0 CLE - diversity)**
LGBTQ+ estate planning: inclusivity considerations when planning for LGBTQ+ clients
Kathleen Copps DiPaola, Esq.—Copps DiPaola Silverman, PLLC, and NY Surrogacy Center
Deborah A. Slezak, Esq.—Cioffi · Slezak · Wildgrube P.C.
Sam Buchbauer, Esq. —Law Offices of David A. Caraway, PLLC

REGISTRATION SCBA Trusts and Estates/Elder Law CLE Seminar
THURSDAY, MAY 19, 2022
Union College (College Park Hall), 450 Nott Street, Schenectady

Cost: \$135 for SCBA members; \$150 for non-SCBA attendees - Includes continental breakfast, lunch

RSVP: **By May 5, 2022** and payable to SCBA (PO Box 1728, Schenectady NY 12301-1728)

Cancelations: Refund requests must be made 3 or more days in advance of the seminar

Scholarships: Available based on financial need - contact info@schenectadycountybar.org

Name: _____

Email: _____

Address: _____

City: _____ State: _____ Zip: _____