

SCHENECTADY COUNTY BAR ASSOCIATION
Trusts, Estates and Elder Law Practice Seminar
Thursday, May 22, 2025 – Union College at College Park Hall, 450 Nott Street, Schenectady
7.5 CLE hours (5.5 professional practice; 1.0 ethics; 1.0 skills)

- 8:00-8:30 a.m. **Registration and continental breakfast**
- 8:30-8:40 a.m. **Welcome**
Deborah A. Slezak, Esq. – Cioffi Slezak Wildgrube P.C.
Christina W. Meier, Esq. – Meier Law Firm, PLLC
- 8:40-9:30 a.m. **Don't lose the forest through the trees: Planning for family camps (1.0 CLE)**
Michelle H. Wildgrube, Esq. – Cioffi Slezak Wildgrube P.C.
Colleen Campoli, CPA – Peterson Campoli & Associates CPAs, PLLC
- 9:30-10:20 a.m. **QPRTs and SLATS – not just funny acrostics, but also powerful estate planning tools. What you need to know: Tax updates; recognizing when high-end estate planning tools are appropriate and how to use them. (1.0 CLE)**
Jennifer M. Boll, Esq. – Harris Beach Murtha
- 10:20-10:30 a.m. **Break / Sponsor presentation**
- 10:30-11:20 a.m. **Planning for a smooth estate administration (1.0 CLE)**
Lauren E. Sharkey, Esq. – Cioffi Slezak Wildgrube P.C.
- 11:20 a.m.-12:10 p.m. **Power of attorney – We all know what it does - but do we? What agents should, and shouldn't do through the use of a power of attorney. (1.0 CLE –ethics)**
JulieAnn Calareso, Esq. – Gleason, Dunn, Walsh & O'Shea
- 12:10-1:00 p.m. **Lunch / Sponsor presentation**
- 1:00-1:25 p.m. **Medicaid update (0.5 CLE)**
Christina W. Meier, Esq. – Meier Law Firm, PLLC
- 1:25-2:15 p.m. **Preparing for your next chapter: Best practices for closing, merging and passing the torch for your law firm (1.0 CLE – skills)**
Amy Herter Robinson, Esq. (moderator), Cioffi Slezak Wildgrube P.C.; Ann Casey, Esq. – Stewart Title; Kara Conway Love, Esq. - BusinessHub Community™
- 2:15-2:25 p.m. **Break / Sponsor presentation**
- 2:25-3:15 p.m. **Panel: What's my responsibility? Understanding the distinct role a fiduciary plays depending on the circumstances (1.0 CLE)**
Ann M. Sharpe, Esq. – Ballston Spa National Bank; John Bresonis, CTFA – Trustco Bank; Marilyn Kraus, CTFA – Arrow Bank
- 3:15-4:05 p.m. **View From the Bench (1.0 CLE)**
Hon. Vincent W. Versaci – Schenectady County Surrogate's Court

REGISTRATION: SCBA Trusts, Estates and Elder Law CLE Seminar

Thursday May 22, 2025 at Union College's College Park Hall, 450 Nott Street, Schenectady

Cost: \$135 for SCBA members; \$250 for non-SCBA attendees (or [join Schenectady County Bar Association](#) and gain member rate); \$75 for paralegals and other law office support staff (no CLE credit) - Includes continental breakfast, lunch

RSVP: By May 8, 2025 and payable to SCBA at PO Box 1728, Schenectady NY 12301-1728 or [pay online](#)

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: _____