

CBA Report

SEPTEMBER/OCTOBER 2026



ELDER LAW AND ESTATE PLANNING

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Still Alive.
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The Future of the Cincinnati Bar Association is Bright

At the end of July, Cincinnati Bar Association (CBA) Executive Director Lisa McPherson and I attended the National Conference of Bar Presidents in Chicago. It was refreshing to see over 60 other regional and state bar associations in attendance and learn about the most recent trends within the bar association industry. On my way back to Cincinnati, I reflected on my time at the conference and the CBA as a whole. Here are a few key takeaways that bolstered my confidence in the CBA.

1. The CBA's staff is a tremendous asset

One thing you realize at a national conference of bar associations is that not all bar associations have the same resources. Some are fully operated by their attorney members and don't have any full-time or part-time staff. Others face financial instability. On the other hand, several bar associations are very stable, the CBA being one of them.

I attribute much of the overriding strength of the CBA in its membership and staff. For example, the CBA has had three executive directors over the past roughly 30 years led by John Norwine (1995-2016), Catherine Glover (2016-2019) and Lisa McPherson (2019-present). This level of continuity of leadership is instrumental in building meaningful relationships within the national and regional bar association community and keeping the CBA apprised of recent trends within the non-profit association industry.

We also have several dedicated and longstanding staff members. The success of the CBA is rooted in the commitment of its staff and their drive to implement member ideas and programming.

2. The CBA's strategic planning has placed it in a sound financial position

The CBA has made a series of solid financial decisions that directly impact its current financial position. Here are just a few notable decisions that have contributed to their financial stability.

The CBA owns the building at 225 East Sixth Street free and clear without a mortgage. The CBA Board of Trustees decided to purchase the building in 2000 as a strategic investment in the local bar community. A few years ago the CBA paid the outstanding mortgage because it had the financial reserves to do so.

In 2019, the CBA considered whether to join other Ohio regional bar associations in forming a notary services partner-



Lisa McPherson, CBA Executive Director (left) and Terry Coates, managing partner at Markovits, Stock & DeMarco, LLC and the 2026-2027 CBA President (right).

ship when notary services were being centralized throughout Ohio. Ultimately, the Board of Trustees voted to join the partnership forming Ohio Notary Services. That decision has proven successful to help shore up operating costs and serve the notary needs throughout Ohio.

The CBA staff continues to be good financial stewards. Recently, the Supreme Court of Ohio implemented large reductions in the amount of time and expenses that regional bar associations may seek for reimbursement. Because regional bar associations, including the CBA, play a vital role in the intake and investigation of grievances against local attorneys, reimbursement for the CBA's involvement in the attorney discipline system is a material portion of the CBA budget. As a result, CBA staff has coordinated a joint, measured approach with the other Ohio Metro Bars to address the concerns of local bar associations on the limitation of grievance-related reimbursement by the Supreme Court of Ohio. In response, the Court has agreed to form a task force to review grievance-related reimbursements. The CBA is hopeful to gain representation on the task force so our perspective is factored into the Supreme Court of Ohio's ultimate decision on the level of grievance-related reimbursement to regional bar associations and certified grievance committees.

We, as the current CBA members, are privileged to have a committed CBA staff who continue to ensure the CBA remains a viable and productive bar association.



Good News: Your Client is Still Alive. Now What?



By Christina Clowers
Flanagan

Estate planning is not just about planning for death. Medical advances mean many people now survive illnesses and events that once would have been fatal, but often with cognitive or physical limitations. As a result, estate planning must also prepare clients for incapacity and end-of-life decisions. Although advance financial and medical directives are essential components of a comprehensive estate plan, they often receive far less attention than dispositive documents. This article highlights why these directives matter, key issues to discuss with clients, and common pitfalls to avoid.

General Powers of Attorney

As I have written previously, I frequently recommend revocable inter vivos trusts that are funded during the client's lifetime. In my experience, financial institutions are far more willing to work with a successor trustee than with an attorney-in-fact acting under a durable power of attorney (POA). Even with a funded trust, however, a POA remains indispensable.

Certain assets, most notably qualified retirement plans, cannot be transferred to a trust during the participant's lifetime. In addition, many clients prefer to keep day-to-day checking and savings accounts titled in their own names to avoid the inconvenience of opening new accounts, changing account numbers, and updating automatic payments and direct deposits.

For these assets, a POA can serve as a "less restrictive alternative" to a guardianship if the client becomes incapacitated.¹

One of the most important drafting decisions involves the statutory "hot powers," powers that must be expressly granted because they permit an agent to significantly alter the principal's estate plan, including making gifts, changing beneficiary designations, creating or amending trusts, and exercising other similarly significant authority.² Whether to include these powers depends entirely on the client's circumstances.

For example, granting broad authority presents little risk when a married couple in a first marriage names each other as attorney-in-fact, their only child as alternate, and all dispositive documents benefit the surviving spouse and child. The same authority may be inappropriate in a blended family or where multiple children have competing interests. In those situations, the powers can often be tailored. For example, permitting beneficiary changes only to name the principal's trust as beneficiary or granting the hot powers to a spouse but placing limitations on successor agents. Elder law attorneys also rely on many of these powers for Medicaid planning after incapacity. The key is to evaluate the risks and benefits for each client rather than treating the hot powers as an all-or-nothing proposition.

A POA can also nominate a guardian for the principal and request that bond be waived.³ For clients with minor or disabled children, it may also nominate a guardian for those children if the client becomes incapacitated.⁴ Many clients assume guardian nominations belong exclusively in a will, but a will has no effect until death. Including a nomination in the POA provides protection during the client's lifetime as well.

Another important consideration is whether the POA should be effective immediately or "spring" into effect only upon incapacity or another specified event.⁵ Although springing POAs appeal to clients who value financial privacy, they often create practical problems. Financial institutions already scrutinize POAs, and requiring proof of incapacity, such as physician certifications, can delay or even prevent an agent from acting when prompt action is needed. Further, physicians may be unwilling to provide the necessary certification, and additional evaluations may become necessary.



Clients, not courts or family members, should make the most important decisions about their lives.”

That said, springing POAs remain appropriate for some clients, particularly those who are unmarried, have no children, or are especially concerned about access to their financial information. Clients should understand both the privacy benefits and the practical drawbacks, and the triggering event should be drafted with precision to avoid unnecessary disputes or delays.

Ohio's statutory POA form⁶ complies with the Uniform Power of Attorney Act, but, in my view, it does not adequately address many of these client-specific issues. A customized document generally better serves the client's needs.

Finally, although a durable POA remains valid until revoked or terminated by law,⁷ many financial institutions are reluctant to honor older documents.⁸ In this region, banks commonly reject POAs that are more than five years old. As a practical matter, clients should periodically execute a new POA, even if nothing has changed, to reduce the likelihood that their family will face an unnecessary guardianship proceeding after incapacity.

Health Care Powers of Attorney and Living Will Declarations

Unlike General Powers of Attorney, I generally use the standard Health Care Power of Attorney (HCPOA) and Living Will Declaration (LWD) forms promulgated by an interagency initiative⁹ and available through the OSBA and other bar associations

and court websites because these documents are often used in emergency situations and health care providers are familiar with the standard forms and, therefore, more comfortable relying on them. Using the standard form, however, does not eliminate the need to explain each document, when it becomes effective, and the significance of its various options.

Clients should first understand the distinction between an HCPOA and an LWD. An HCPOA appoints an agent to make health care decisions when the principal cannot communicate or give informed consent. An LWD, by contrast, allows the declarant to direct end-of-life care in advance and becomes effective only in limited circumstances: a terminal condition where death is deemed imminent¹⁰ or when the declarant is in a permanently unconscious state.¹¹ Unlike an HCPOA, which authorizes an agent to decide whether to withdraw or refuse life-sustaining treatment, an LWD is the declarant's own legally enforceable instruction regarding end-of-life care.

Clients and their agents also frequently misunderstand Do Not Resuscitate Orders (DNRs). A DNR is a physician's medical order, not an advance directive. Unless restricted by the document, an HCPOA authorizes an agent to sign a DNR on the principal's behalf, and a physician may issue a DNR when an LWD has been triggered.

Another important discussion involves the "Special Instructions" regarding artificial nutrition and hydration. These provisions apply only when the patient is in a permanently unconscious state, not merely terminally ill. Clients often have deeply held personal or religious beliefs on this issue.¹² Some prefer to leave the decision to their health care agent, while others want to make the decision themselves through an LWD to spare loved ones the burden of making it. Whatever approach the client chooses, the documents should accurately reflect that intent.

Care should also be taken in the selection of health care agents. It is not uncommon for clients to initially identify the same individual(s) to serve as fiduciary in all of their estate planning documents. I recommend probing further to ensure that the individuals named in the financial roles are also appropriate as the health care agent(s).

Like financial POAs, HCPOAs may nominate a guardian and request that bond be waived if a guardianship becomes necessary. When the agents named in the POA and the HCPOA are different or in a different order, care should be taken to ensure the documents work together rather than create conflicting authority in regard to guardian nominations.

One Final Planning Tool

Although this article focuses on planning for situations arising during life, I want to mention one

additional planning tool: Ohio's Appointment of Representative for Disposition of Bodily Remains, Funeral Arrangements and Burial or Cremation Goods and Services¹³ ("Disposition of Remains"). In practice, a Disposition of Remains functions much like a power of attorney that survives death. I do not recommend it for every client, but it is particularly valuable for blended families, unmarried clients without adult children, and clients with strong preferences regarding cremation, burial, or religious observances. The statutory form¹⁴ generally works well for these purposes.

Many clients assume their will is the appropriate place to provide funeral instructions. In reality, final arrangements are usually made long before anyone reviews the will or an executor is appointed. When clients have specific wishes or want to avoid potential conflict, a Disposition of Remains is an effective tool.¹⁵ If one is prepared, it should clearly identify both the client's wishes and the anticipated source of payment for those arrangements, like insurance policies or trust or probate assets.

Conclusion

Advance directives are not merely ancillary documents that accompany the "real" estate plan. They are often the documents that have the greatest practical impact during a client's lifetime. By giving financial and health care directives the same thoughtful attention as wills and trusts, attorneys can better protect clients during periods of incapacity, reduce the likelihood of guardianship proceedings, and help ensure that clients, not courts or family members acting without guidance, make the most important decisions about their lives.

Christina Clowers Flanagan is a partner at Wood + Lamping LLP and is currently serving as co-Chair of the CBA Estate Planning & Probate Practice Group and on the Board of Trustees of the Cincinnati Estate Planning Council. She is an OSBA Certified Specialist in Estate Planning, Trust & Probate Law; has received the Accredited Estate Planner® Designation from the National Association of Estate Planners & Councils and is licensed to practice in Ohio and Kentucky.

- 1 R.C. 2111.02(C)(5) & (6).
- 2 R.C. 1337.42(A). R.C. 1337.42(B) requires express authority in the POA for certain actions when the attorney-in-fact is not an ancestor, spouse or descendant of the principal. Pursuant to R.C. 1337.42(D), unless the POA says otherwise, the authority to make gifts is subject to section R.C. 1337.58.
- 3 R.C. 1337.28(A) & (B). See R.C. 2111.121 for an alternative method for nominating guardians of oneself.
- 4 R.C. 1337.28(A). See R.C. 2111.121 for an alternative method for nominating guardians of minor and disabled children.
- 5 See R.C. 1337.29.
- 6 R.C. 1337.60.
- 7 R.C. 1337.30.
- 8 Notably, when adopting the Uniform Power of Attorney Act, the General Assembly did not include provisions related to liability to third parties who unreasonably reject a properly executed POA. See, e.g., Fla. Stat. 709.2120.
- 9 Leading Age Ohio, Ohio State Medical Association, Ohio Osteopathic Association and Ohio State Bar Association.
- 10 R.C. 1337.11(BB).
- 11 R.C. 1337.11(V).
- 12 As I mentioned, I generally use the standard forms. The exceptions are generally related to clients whose religious faith requires a different approach. In those cases, I use a modified version of the standard form that addresses or incorporates the religious doctrine at issue.
- 13 R.C. 2108.70 et seq.
- 14 R.C. 2108.72.
- 15 Funeral pre-planning and purchase of cemetery plots is an effective alternative.

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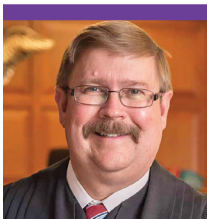
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Avoiding Citations and Timely Completing Fiduciary Accounts in Probate Court



By Chief Magistrate
Paul D. Rattermann

The vast majority of cases filed in the probate court involve decedent estates, guardianships, and testamentary trusts. Each of those case types require the filing of fiduciary accounts by executors/administrators, guardians, and trustees. Judge Ralph “Ted” Winkler and I regularly see the importance of timely and accurate fiduciary account filings in our work on the probate court. Such accounts are public record and can be reviewed by beneficiaries, next of kin, and other interested persons at the courthouse or on the court’s website.

It is the experience of court staff that filing fiduciary accounts poses a major source of problems for practitioners. During the first two quarters of this year, 744 overdue notices were issued by the Hamilton County Probate Court in decedent estate, guardianship and trust cases for accounts being overdue. Additionally, 449 citations were issued during that time frame due to the failure of having fiduciary accounts filed in a timely manner.

The purpose of this article is to provide information on the citation process as well as to provide a list of common reasons why fiduciary accounts are rejected for filing.

Overview of the citation process

Numerous statutory filing deadlines are incorporated into the probate code. These deadlines include

the requirement that fiduciary accounts be filed in decedent estates, guardianships, and certain trusts. In decedent’s estates, a fiduciary account is due six months after Letters of Authority are issued or 13 months thereafter if a Notice of Extension (Form 13.10) or Application to Extend Administration (Form 13.81) are filed.¹

“Filing fiduciary accounts poses a major source of problems for practitioners.”

Guardian accounts are due one year after Letters of Appointment are issued to the Guardian and yearly thereafter.² Trustee accounts are due every two years after Letters of Trustee are issued.³

Failure to meet the above deadlines will cause the case to be moved onto the citation track resulting in the issuance of Overdue Notices (Pink Cards) to the fiduciary and attorney. The fiduciary then has until the end of the month that the Overdue Notice is sent to either file the account or obtain an extension of time. Use Form 13.81 to request extensions in decedent estates and Form 245.xx to request extensions in guardianships and trusts.

If nothing is filed in response to Overdue Notice, a citation will be issued at the beginning of the following month to the attorney and/or fiduciary to personally appear at a citation hearing. Citation hearings are conducted on Wednesday mornings at 9:30 a.m. in Courtroom B. Filing the account which is overdue will excuse the attorney or fiduciary from attending the citation hearing.

If the account is still not filed and if the attorney or fiduciary also fail to attend the citation hearing, the court may issue a body attachment. This is an order to the Sheriff's Department to personally serve the attorney or fiduciary with the citation which will contain a new continuation date. The filing of the account after a body attachment is issued is not sufficient to be excused from attending the body attachment citation hearing. The court must expressly excuse the attorney's or fiduciary's presence from that hearing.

Common Reasons Accounts Are Rejected

All fiduciary accounts which are presented for filing are reviewed by the court's accounts department. Court staff will review the account and all supporting documentation. If the account is approved, it will be filed and set for hearing in approximately six weeks. If no objections are filed in the interim, the assigned Magistrate (or the Judge for final accounts) will review the account once more before the entry approving and settling the account is filed.

If the account is found not to be acceptable, it will be rejected. The attorney or fiduciary (in pro se cases) will be contacted about what deficiencies exist in the proffered account and what is needed to be done to cure the defects. The following is a list of the common reasons that presented accounts may be rejected. Avoiding these common mistakes will assist practitioners in having their presented accounts approved.

1 Form 13.9 Certification of Service of Account to Heirs and Beneficiaries is not attached to a presented account.

All accounts in decedent estates (both partial and final) must have this form filed with the account.⁴

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Disbursements shown on the account must have supporting documentation showing the payee and amount disbursed.”

Form 13.81 Application to Extend Administration is required with *partial* accounts in decedent estates. Since a final account is not being filed to close the case in this instance, it is necessary that the court provide a new deadline for the conclusion of the administration process. This new date is fact dependent and will vary from case to case.

2 Form 54.0 Trust Beneficiaries is not attached to trust accounts.

The trustee must provide a list of the names and addresses of all current and residual beneficiaries of the trust estate. This is important information since many trust cases go on for many years and beneficiaries may move or pass away. Certain classes of beneficiaries may also expand as additional beneficiaries are born as well.

3 Attorney fees are included on the account as a disbursement without a corresponding entry approving the payment of such fees.

All attorney fees must be approved by the Court before they are paid. Various methods exist for the approval of attorney fees and vary depending upon the type of case involved.⁵

4 Canceled checks, receipts, or vouchers are not presented with the account.

All disbursements shown on the account must have supporting documentation showing the payee and amount disbursed. Thus, it is important that the bank account which is opened for the estate, guardianship or trust provide images of negotiated checks which are written by the fiduciary. This is why debit cards should not be used by fiduciaries.⁶

The account does not balance.

The formula for an account is: Receipts minus Disbursements equals Assets Remaining. “Receipts” include the value of inventory assets not sold or the balance remaining from the previous account plus income and other items received during the accounting period. “Disbursements” include any and all withdrawals from the account including checks written and bank fees.

If “Assets Remaining” are zero, the account is deemed to be a final account. However, if assets do remain, the account is deemed to be a partial account in decedent’s estates or a current account in guardianships and trusts.

5 Failure to attach a closing statement to the account.

If real estate has been sold during the accounting period, a copy of the closing statement must be provided.⁷ Likewise, if a business interest is sold, a copy of the purchase agreement should be provided.

6 Lack of proof that a claim against a decedent has been released or rejected on final accounts.

If creditors file claims against a decedent’s estate, the fiduciary must determine whether to allow or reject the claim. If rejected, a copy of the rejection letter sent to the creditor must be filed in the case. If the claim is allowed, a release of claim or proof that the claim has been paid in full (canceled check, paid invoice, or the like) must be filed before a *final* account can be approved.

7 The account lacks the original signatures of ALL fiduciaries.

Accounts are one of the few types of documents which cannot be e-filed or fax filed with the court.⁸ An original account must be presented for filing with supporting documentation either in person or through the mail. Original signatures of *all* fiduciaries must be on the account. (Counterpart documents bearing an individual fiduciary’s signature are permissible).⁹

8 Form 2.4 Certificate of Notice of Probate of Will was not filed.

In testate decedent’s estates, it is required that notice that the decedent’s will has been admitted to probate be given to the surviving spouse, next of kin and beneficiaries named in the will.¹⁰ This process can prove difficult if those individuals live overseas or in remote areas. However, a final account cannot be approved for filing until that notice has been given.

Avoiding the above problems will assist counsel and fiduciaries in having their accounts successfully filed and avoid having the case placed on the citation docket.

Finally, please note that appointments can be made in advance to meet with a staff member of the accounts department to review an account. Please contact the court’s information desk at (513) 946-3570 to schedule an appointment.

Paul D. Rattermann has served as the Chief Magistrate of the Hamilton County Probate Court since 2003. He was engaged in private practice prior thereto.

1 R.C. 2109.301

2 R.C. 2109.302

3 R.C. 2109.303(A)

4 R.C. 2109.32

5 Local Rules 71.1 for decedent estates; 66.1 for guardianships and 74.2 for trusts.

6 Local rule 66.1(E)

7 Local Rule 64.1(A)(4)

8 Local Rules 57.3 & 57.4

9 Local Rule 64.1(A)(5)

10 10. R.C. 2107.19(A)

What Every Attorney Should Know About Elder Law and Special Needs Planning



What are Elder Law and Special Needs Law? While estate planning focuses primarily on how assets are distributed after death, elder law and special needs planning is broader, focusing on a senior or disabled individual's finances, autonomy, and healthcare while they are alive. A variety of other practice areas commonly intersect with elder law and special needs, not just estate planning. Domestic relations, personal injury, and worker's compensation are just a few practice areas that intersect. If these types of cases are not handled properly for a disabled individual, it could have a catastrophic impact on a client's ability to qualify for government benefits, which for many disabled individuals are needed to help pay for care needs.

Some basics that every attorney should know about elder law and special needs:

Medicaid Planning and Long-Term Care Planning.

Traditional estate plans can easily be derailed by the high cost of nursing home care. Most people do not want to think about what may happen if they or a family member needs extended care. The fact is that most people will require some form of long-term care and most will either be unable to afford it or will completely deplete their assets to pay for that care. There are legal and ethical ways of protecting one's assets against the cost of care. Further, inheritance or settlements can be lost if the recipient has care needs and is already on or needs to apply for government benefits like Medicaid or Supplemental Security Income (SSI).

The Medicaid rules are complex and include a look-back period and asset transfer penalties. But with proper planning some assets can be preserved. Prior to transferring assets to a client or beneficiary that is disabled you should consult an elder law and special needs planning attorney to make sure the transfer of assets will not impact the disabled client's ability to qualify or continue

to qualify for benefits. There are different types of trusts that can be used to protect a disabled individual's assets, while still qualifying for Medicaid or SSI. It is imperative to use a type of trust best suited for the client and his or her specific situation.

Powers of Attorney.

Clients should appoint trusted agents to manage complex medical and financial decisions if cognitive decline or a disability arises. While Ohio has a statutory financial power of attorney form, this document alone is not sufficient to assist a disabled individual when trying to protect assets or apply for care. For example, if a qualified income trust is needed for an individual to be income eligible for Medicaid, the financial power of attorney needs to give the trusted agent the power to create this type of trust. The statutory form alone does not allow an agent to create this type of trust. Broader powers should be included in the financial power of attorney to allow for Medicaid planning or special needs planning. Creating a durable non-springing power of attorney is another important consideration. Springing powers of attorney can often be difficult to activate and generate delays in their effectiveness when proof of the springing event is required. We often see springing powers of attorney



By Ashley Shannon Burke

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leading to delays in obtaining needed benefits. If you use a springing power of attorney, clearly identify the triggering event and documentation needed to activate the power of attorney.

Clients should also have comprehensive healthcare directives, including health care powers of attorney, living wills, and HIPAA releases. While Ohio does not recognize Medical Orders for Life Sustaining Treatment (MOLST) or Physician Orders for Life Sustaining Treatment (POLST), these documents can be helpful for a client to review with his or her trusted agent to spark discussions of what type of medical care the client may want in the future under certain medical situations.

For both the financial and health care powers of attorney, it is also important to discuss naming at least two agents. If only one agent is named and something happens to prevent that agent from serving, an incapacitated principal could be left with a court approved guardianship as the only option. If proactively planning by naming multiple agents, then the discussions focus on whether to designate co-agents or successor agents. If a client wants to name co-agents, it is important to use clear language on how to handle decisions if the co-agents do not agree on a financial or medical decision.

Diminished Capacity and Planning.

A common misconception is that a diagnosis of dementia, Alzheimer's or some other disease impacting cognitive ability automatically renders the individual incapable of signing legal documents. This may or may not be true. It depends on the disease's progression and a more detailed analysis of whether the individual has the requisite capacity at the time the documents are signed. The medical definition of incapacity can differ from the legal definition of incapacity. A person with a diagnosed cognitive impairment may still be legally competent to sign the documents. It is important to know the capacity requirement for each document when assessing a client's ability to execute such legal documents. When working with a client that possesses a capacity issue, it is essential to establish a framework for assessing capacity and documenting capacity in the client's file in case it is called into question in the future.

On February 9, 2026, the American Bar Association updated Model Rule 1.14 to help combat disability bias and misconceptions around "diminished capacity." The ABA's Model Rule 1.14 updated by replacing "client with diminished capacity" with "clients with decision-making limitations." The ABA also removed the phrase "normal client-lawyer relationship" in favor of "ordinary client-lawyer relationship." The amendments sought to emphasize that a client's capacity is rarely an "all or nothing" permanent deficit. Limitations are treated as situational, capable of varying over time, and can be supported by appropriate accommodations.

If a client has failed to establish a financial or health care power of attorney and now lacks the legal capacity to execute one, then the family may be forced into a guardianship. Guardianship is the most restrictive form of support for an individual. Since guardianship requires probate court intervention, it can be both timely and costly. However, without an adequate power of attorney in place, it may be the only option for a client with decision-making limitations.

Veterans Benefits.

If a client is a veteran, they may be eligible for veteran benefits in addition to pension or disability compensation benefits they may be receiving. However, the veteran will need to meet specific service eligibility criteria for most of these benefits and the rules differ significantly from the Medicaid eligibility rules. Veteran benefits are governed by the U.S. Department of Veterans Affairs (VA) and the VA has complex eligibility rules for veteran benefits. These criteria include asset and income limitation rules, look-back periods, and asset transfer penalties.

Vulnerability and Abuse.

Seniors and disabled individuals are highly susceptible to financial exploitation and undue influence. Attorneys are required reporters of elder abuse in Ohio. (See Ohio Rev. Code Ann. § 5101.63) Attorneys should know how to spot the warning signs

of abuse, exploitation, or undue influence. They also should integrate safeguards into legal documents they are drafting.

Below are some warning signs of financial exploitation and undue influence:

- Sudden changes in bank accounts or banking practices
- Unexplained withdrawal of large sums of money by a person accompanying the older adult
- Inclusion of additional names on an older adult's bank signature card
- Unauthorized withdrawal of the older adult's funds using their ATM card
- Abrupt changes in a will or other estate planning or financial documents
- Unexplained disappearance of funds or valuable possessions
- Bills left unpaid despite the availability of adequate financial resources
- Discovery of a forged signature for financial transactions
- Sudden appearance of previously uninvolved relatives claiming their rights to an older adult's property or possessions
- Unexplained sudden transfer of assets to a family member or someone outside the family
- The provision of unnecessary services
- An older adult's report of financial exploitation
- Unexplained credit card charges

Summary.

If you are working with an elderly or disabled client, stop and consider if anything you are doing could impact the client's assets, income, insurance, or quality of life. If the answer is yes, please do your client and yourself a favor and consult an elder law and special needs planning attorney. This may ensure your client can maintain their autonomy, insurance, assets, and qualify for government benefits they currently need or may need in the future.

Ashley Shannon Burke, CELA, CAP. Ashley is certified as a Certified Elder Law Attorney by the OSBA and The National Elder Law Foundation. She is a member of the Council of Advanced Practitioners (CAP) and the Special Needs Alliance (SNA). She regularly advised clients on Medicaid, estate planning for families with disabilities, lifetime gifting and transfer at death, and asset protection.



You can report elder abuse and access services in Hamilton County by calling 513-421-LIFE (5433) or ProSeniors at (513) 345-4160.



Explore a regular feature that highlights our experienced attorneys and the unique paths that lead them to this chapter of their legal career.

A Look Back

With Martin Pinales



The Bar Association recently asked me to write an article reflecting on what it was like to practice law when I began my career more than half a century ago, compared with the profession today. They prefaced the request by noting they were looking for a “seasoned attorney,” a gracious way of saying they wanted someone who is “old.”

I graduated from the Chase College of Law Evening Program in 1968. At the time, the law school was located in downtown Cincinnati in the YMCA building at the corner of Parkway and Elm. During the day, I served as a law clerk in the Hamilton County Court of Common Pleas, first for Judge Carson Hoy and later for Judge William R. Matthews. I was in distinguished company. Among my fellow clerks were Simon Leis, Nick Nadel, Ron Panioto, and John O’Connor, all of whom went on to become judges. My ambition, however, was simply to practice law.

The law clerks would meet for lunch every other Thursday at Arnold’s. Every fourth Thursday we would invite one of the judges to join us. Those gatherings gave us the opportunity to get to know the judges outside the courtroom, relationships that proved invaluable later in practice. It made going into private practice easier because those assignments gave me a financial base for my criminal practice.

At that time, there was not a Public Defender’s Office, and there were no CLE courses on professionalism. We did not need them. Civility and mutual respect were simply part of the culture. We respected judges, not necessarily because we agreed with every ruling, but because we respected the office they held. We would fight vigorously in the courtroom, then go to happy hour afterward.

When I entered practice, it was easier than today. There were fewer lawyers and only ten criminal statutes. Everyone knew each other. Criminal cases were not assigned to an individual judge, except for capital cases. The cases would all go to one judge who would rotate as criminal judge once a month. That judge would call all the criminal cases for the day. An assignment commis-

sioner would then go and dole the cases to judges that were free that day. It was very helpful to make friends with the assignment commissioner, as it was our way of “judge shopping.”

My years as a law clerk provided an education that augmented my legal education. I learned by sitting in the courtroom and observing remarkable trial lawyers in action. Attorneys such as Bernie Gilday, Foss Hopkins, Bob Stachler, Bob Bernie, and the MacIntosh brothers were legendary advocates and unforgettable personalities. Just as importantly, they were generous with their time and wisdom. If a younger lawyer had a question, they were always willing to offer guidance. There was a genuine sense that members of the profession looked out for one another.

One experience has stayed with me throughout my career. After a client of mine was sentenced to a lengthy prison term, I walked into the hallway and started to cry. Foss Hopkins saw me, put his arm around my shoulder, and walked with me down the hall. He spoke to me with the kindness and reassurance of a father, helping me regain my composure. I will never forget his kindness or his compassion.

I recognize that every generation of lawyers faces different challenges. The law has become more complex, technology has transformed the practice, and the demands on attorneys have increased. Perhaps there is something to be learned from those earlier days. We can advocate zealously for our clients while still treating one another with respect, generosity, and professionalism. Those qualities not only strengthen our profession, but they also make the practice of law a far more rewarding calling.

Today, the comradery seems to have disappeared. I think we should all take a deep breath, relax, and practice professionalism.

Martin Pinales is a founding attorney at Pinales Stachler Young & Burrell Co. LPA in Cincinnati, where he has represented individuals and businesses in complex state and federal criminal matters for more than five decades. A nationally recognized trial and appellate advocate, he is a past president of the National Association of Criminal Defense Lawyers, a frequent lecturer on trial advocacy and legal ethics, and a longtime member of the Cincinnati Bar Association’s Ethics Committee and Inn of Court.



Melissa Watt

WOMEN LAWYERS PRACTICE GROUP
CHAIR



What did you want to be when you grew up?

Growing up, I wanted to be a writer. I remember reading *The Lottery* by Shirley Jackson in seventh grade and I was hooked. Then, my ninth-grade English teacher, Mr. Bates, read *To Kill a Mockingbird* by Harper Lee and *Fahrenheit 451* by Ray Bradbury out loud. I have always been fascinated with the ways writers can both act as a witness and subtly tell stories within their stories.

What's your favorite food and why?

Ice cream for obvious reasons. Every year, we go on vacation with my sister's family, and we have an ice cream bar every night. Some of my favorites are cinnamon from Aglamesis, black cherry chip from Graeter's, pumpkin from The Cone, chocolate peanut butter from Haagen-Dazs, and chunky monkey from Ben & Jerry's.

Tell us about an important lesson you've learned during your law career.

One of the most important lessons I have learned during my law career is how much reputation matters. The courts, clients, other attorneys, they all rely on us to be forthright and trustworthy, and it takes time to build that reputation.

What are your goals this year as Chair?

My goal for this year is to increase engagement and recruit members to join the committee. We have a lot of ideas for interesting events and speakers and would love to have some additional motivated members to help make them a reality and spread the word.

Email mymembership@cincybar.org to join the Women Lawyers group.



The CBA in Service

Do you want to make meaningful contributions to your community? Members of the Cincinnati Bar Association are committed to serving Greater Cincinnati, and the Community Service Committee encourages volunteer service of its members in the community. Each year, the CBA sponsors several service projects to continue engagement within the Greater Cincinnati region and to benefit its citizens. If you want to be a part of this committee and make a difference, you can join via your member dashboard or you can email mymembership@cincybar.org for more information.

Cincinnati Bar
ASSOCIATIONCincinnati Bar
FOUNDATION

2026 Senior Counselors' Celebration

WEDNESDAY, SEPTEMBER 16

12 p.m.

The Westin Cincinnati,
21 E. 5th Street

2026 INDUCTEES

*Please join us for this celebration honoring our members
who have turned 75 or have been in practice for 50 years*

Todd H. Bailey
Lawrence E. Barbieri
James H. Brun
Edward J. Collins
Jack A. Donenfeld
Gary Moore Eby
Raymond T. Faller
Jan M. Frankel

Alphonse A. Gerhardstein
Nancy J. Gill
Gary S. Goldman
Brett C. Goodson
Michael A. Hirschfeld
Timothy J. Hurley
Edward J. McTigue
Charles M. Meyer

Alfred K. Nippert Jr.
Robert Armand Perez Sr.
Norton B. Roberts
Louis F. Solimine
James P. Sullivan
Carolyn A. Taggart
George B. Wilkinson
Gregory E. Young



Faller

Lifetime Achievement IN LAW



Lawrence

The Cincinnati Bar Foundation will present the John L. Muething Lifetime Achievement in Law Award to Raymond T. Faller and James K.L. Lawrence.

The honor is presented for more than 50 years of exemplary service as a lawyer. Through their distinguished careers, they have reflected the highest principles and traditions of the legal profession.

Thank You to Our Sponsors



RSVP by September 7 at www.cincybar.org.

Questions? Contact us at (513) 381-8213 or mymembership@cincybar.org.



Together, We Invest in Justice

Your contribution to the Investing for Justice Campaign turns the generosity of Cincinnati's legal community into a lasting impact. To date, the Foundation has awarded over \$2.9 million in grants to local organizations such as the Legal Aid Society of Cincinnati, ProKids, the Immigrant and Refugee Law Center, Pro Bono Partnership of Greater Cincinnati, and Women Helping Women. Through your donations, the Cincinnati Bar Foundation continues to strengthen access to justice for our neighbors who need it most.



*Danielle Lorenz,
CBF President*

MEMORIAL GIFTS

The Cincinnati Bar Foundation gratefully acknowledges the following gifts:

In Memory of

James W. Patton
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John C. Norwine



Cincinnati Bar
FOUNDATION

Thanks to those joining the

Annual Advocates Circle

GOLD

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ROCK THE FOUNDATION

THURSDAY, NOV 12

DOORS OPEN 5:30PM

PERFORMANCE 6-9PM

SOUTHGATE HOUSE REVIVAL

TICKETS



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Your ongoing donations have empowered us to distribute over **\$3 million** to local organizations.

The Cincinnati Bar Foundation is committed to ensuring equal access to justice and fostering a community that trusts and benefits from our legal system. Join your colleagues today to continue this legacy of giving.

Become an Annual Advocate

Platinum \$1000 | Gold \$500 | Silver \$250

- Recognition on social media and the Annual Meeting program
- Featured in the CBA Report Annual Advocate Circle
- Featured on the CBF Donor Wall



Scan here to donate or visit cincybar.org/donate

We have provided grants to:

SUPPORT THE PROFESSION:

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- CALL Scholarships
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- Youth Court
- Back2Back Ministries
- Found Village

EMPOWER CITIZENS:

- Cincinnati Works
- Legal Aid Society of Cincinnati
- Volunteer Lawyers for the Poor
- Pro Bono Partnership of Ohio
- Immigrant & Refugee Law Center

HELP FAMILIES:

- Children's Home of Cincinnati
- Northern Kentucky University Children's Law Center
- Talbert House

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- Law and Leadership Institute LLC
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EDUCATE YOUTH:

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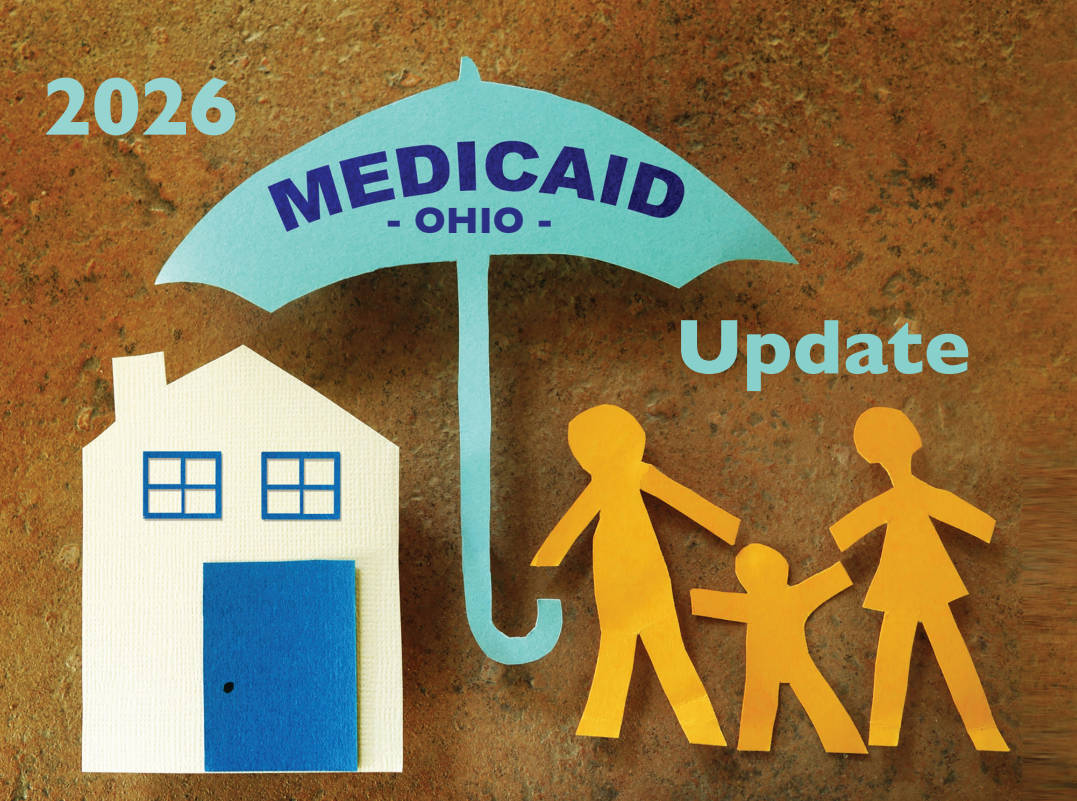
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- Pro Bono Partnership of Ohio
- Urban League of Greater SW Ohio

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2026
MEDICAID
- OHIO -
Update



September 10, 2026

12:00 p.m. – 1:00 p.m.

1.0 General Credit
Hour (pending)



**Cincinnati Bar
FOUNDATION**

This program was made
possible by a grant from the
Cincinnati Bar Foundation



Mindfulness and the Ethical Lawyer



October 6, 13, 20, 27 + November 3, 10

12:00 p.m. – 1:00 p.m.

Up to 6.0 Hours Attorney Professional Conduct (pending)

This six-week course introduces the concepts and practices for mindfulness, stress reduction, and performance increasing techniques. Attendees will also learn how these techniques relate to essential workplace skills and the scientific rationale.

Visit **cincybar.org** for our latest CLE offerings.

LEGAL BASICS: Intellectual Property Procurement and Enforcement



September 24, 2026 | 12:00 p.m. – 1:00 p.m.
1.0 Hour of New Lawyer Training Credit (pending)

The 36th
All Ohio
Annual Institute
On Intellectual Property

AOAIOIP



WEDNESDAY, OCTOBER 7
THURSDAY, OCTOBER 8

CLE Credit

Ohio: 10.75 Hours,
including 1.25 hours Attorney
Professional Conduct credit (pending)

Indiana & Kentucky:
10.75 Hours, including 1.25 hours
Ethics credit (pending)

OCTOBER 7, 2026

(I) GENERAL SESSION | 8:30 A.M. – 3 p.m.

- US Patent Law Year in Review
- Copyright Law Developments
- Trademark Law Developments
- The World Unknown: Implicative Data and Other New Ways of Seeing
- Clone Wars: The Use (and Misuse) of Digital Replicas

(II) PROFESSIONAL CONDUCT SESSION | 3:15 – 4:30 p.m.

- Quitting While You're Ahead: Avoiding Common Ethics Problems Before They Arise
- Dealing with Difficult People: Mindfulness Strategies for Lawyers

OCTOBER 8, 2026

(III) PATENT SESSION | 9 – 11:30 a.m.

- Navigating the PTAB's New Landscape
- Real-World AI in Patent Preparation and Prosecution: What Works, What Doesn't, and What Comes Next
- Damages Strategy- How Legal Team Can Best Support Damages Team

(IV) NAME, IMAGE LIKENESS / TRADEMARK SESSION | 1 – 3:30 p.m.

- College Athletics Industry Updates: Business, Litigation and Legislation
- Friends with Trademarks: When Competitors Agree to Get Along
- Presumed Fluent: The Challenges of the Doctrine of Foreign Equivalents

Supreme Court Update

A Review of the 2025-2026 Term and a Look Ahead to 2026-2027



October 14, 2026
11:00 a.m. – 1:00 p.m.



2.0 Hours General CLE Credit
(pending)

REMINDER: Ohio attorneys with last names M-Z must complete CLE requirements by December 31, 2026.

Voting Rights and Election Law

October 26, 2026
12:00 p.m. – 1:00 p.m.
1.0 Hour General CLE (pending)





Cincinnati Bar
ASSOCIATION



Courthouse Connections

*Sponsored by the Commission on Professionalism
and the CBA Professionalism Committee.*

Thursday, October 1, 2026

1 - 3:30 p.m.

Hamilton County Courthouse
Law Library

[Register at cincybar.org](http://cincybar.org)

Join Us for a
Courtroom Tour
and conversation

with judges and courthouse staff

TOUR



Tour Courtrooms and
learn about courtroom
procedures

MEET



Enjoy networking
and information
sessions in the Hamilton
County Law Library

LEARN



Learn how the
Law Librarians
can help you

Past President's Luncheon

In June the CBA hosted its annual Past President's Luncheon. These gatherings provide an opportunity to reconnect, share memories, and celebrate their lasting contributions to the organization and the legal community. Thank you for your continued support and dedication.



Pam Popp, Bob Gehring, Frank Diedrichs



Alan Abes, CBA President, Terry Coates, Doloris Learmonth, Hon. Beth Myers, Sara Cooperrider



Sara Cooperrider, Alan Abes, Jeff Shoskin, John Tafaro, Tony Reiss, Justice Pat Fischer, Terry Coates



Doloris Learmonth and Kelly Mulloy Myers

ETHICAL QUANDARY?

The CBA is proud to offer ethical guidance to Greater Cincinnati attorneys through our Ethics Committee's hotline.

September

George D. Jonson 513-768-5220
Phyllis Bossin 513-421-4420

October

Chuck Strain 513-621-2889
Dimitry Orlet 513-458-5506

The members of the CBA Ethics & Professional Responsibility Committee listed above are available to help you interpret your obligations under the Ohio Rules of Professional Conduct. Questions posed should be framed hypothetically and should relate to your own prospective conduct. The committee also accepts requests for written opinions.

RKPT | ROBBINS
KELLY
PATTERSON
TUCKER
A Legal Professional Association

is pleased to welcome



Margaret Johnson
Corporate Practice Group

Margaret's practice includes business formation and structure, corporate governance, commercial transactions, and complex merger and acquisition transactions. Prior to joining RKPT, Margaret served as in-house counsel for a multinational Fortune 500 corporation.

Barbara J. Howard Makes History as ABA President

Congratulations to Barb Howard (center) on her installation as ABA President. As a past president of both the CBA and OSBA, she is the first female president from Ohio to hold this position. Erin Childs (left, back of Howard), CBA's ABA Delegate was also in attendance for the House of Delegates meeting.



27th Annual Red Mass Set for October 16



The St. Thomas More Lawyers Guild of Greater Cincinnati is planning its Twenty-Seventh Annual Red Mass, which will be held on Friday, October 16, 2026 at 11:30 a.m. at St. Francis Xavier Church in Cincinnati, OH. The Most Reverend Robert Casey, Archbishop of the Archdiocese of Cincinnati, will celebrate the Mass. A complimentary reception will follow in the church undercroft. Our invitation is extended to the legal and political communities of the entire Tri-State area regardless of faith background.

CBA Celebrates Three 40 Under 40 Honorees

Congratulations to the following CBA members for being honored with the 40 Under 40 Award from the Cincinnati Business Courier:



Jenna Heaphy,
GE Aerospace



Kellie Kulka,
Bricker Graydon
Wyatt LLP,
CBA Trustee



Tessa Castner,
FBT Gibbons



The following law firms, legal organizations and law departments have achieved 100% membership in the Cincinnati Bar Association for the current bar year.

American Association of University Professors: University of Cincinnati
Baker & Hostetler LLP
Barbara J. Howard Co. LPA
Barron Peck Bennie & Schlemmer Co. LPA
Benjamin Heather Iacofano & Bitter LLC
Beth I. Silverman & Associates LLC
Blake P. Somers LLC
Blank Rome LLP
Blessing & Wallace Law LLC
Boehm Kurtz & Lowry
Bonezzi Switzer Polito & Perry
Brown Law Firm LLC
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Phillips Law Firm Inc.
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Schimpf Ginocchio Kehres & Clark LLC
Schroeder Maundrell Barbieri & Powers
Slovin & Council LPA
Smyth & Mullin LLC
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Sundance Land Title Agency
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The Moore Law Firm LPA
Thomas Downing Law Firm
Thomson Law Co.
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Wiete Law Office
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Yocum & Neuroth LLC
Young Reverman & Bolotin

KMK Law® Welcomes Peter M. Slater as Partner



Keating Muething & Klekamp PLL (KMK Law®) has added Peter M. Slater as a partner in the firm's Private Client Services Group. Slater brings deep experience advising high-net-worth individuals, families, and business owners on sophisticated planning matters, further strengthening the firm's ability to serve clients with complex personal and business interests.

Slater partners closely with clients advising individuals, families, and closely held business owners on estate planning, wealth transfer, and business succession and related income tax matters. His practice includes estate, gift, and tax planning; charitable giving strategies; asset protection planning; and the orderly transition of wealth and property during life and after death.

Prior to joining KMK Law, Slater was a partner with Porter Wright Morris & Arthur LLP for five years and a partner with Graydon Head & Ritchey LLP for nearly 20 years. Slater earned his LL.M. from Georgetown University Law Center in 1993 and his J.D. from Case Western Reserve University Law School in 1992. Slater is licensed to practice law in Ohio and New York.

KMK Law® Adds Four Attorneys Across Key Practice Groups



MICHAEL G. (MICKEY) SUTTON serves as Of Counsel in the firm's Business Representation & Transactions and Intellectual Property Groups where he advises businesses, creators, and individuals on intellectual property, brand strategy, and commercial matters. Sutton works with individuals and emerging and established national and international brands on strategies to secure and protect IP portfolios, protect brand value, strengthen distribution channels, and support growth across e-commerce, online marketplace, and traditional retail environments. Sutton earned his J.D. from the Donald P. Klekamp College of Law at the University of Cincinnati in 2017, cum laude. Sutton is admitted to practice law in Ohio and Kentucky.



JAMES M. (JIM) SCHIRMER is an associate in the Litigation Group, where he focuses his practice on real estate and construction litigation. His wide-ranging litigation practice includes, among other areas, representing individuals, companies, and public entities in contract disputes, construction, land use, zoning, and eminent domain issues. Schirmer's experience includes all aspects of litigation before state and federal courts, as well as private and court-ordered mediation, including depositions, oral argument, motion practice, written discovery, trial preparation, trial, and appellate litigation. Schirmer also advises clients on pre-litigation matters such as risk loss and prevention. Schirmer earned his J.D. from The Ohio State University Moritz College of Law in 2021. Schirmer is licensed to practice law in Ohio and Kentucky.



JAMES A. (JAMIE) STAGNARO practices in the firm's Real Estate Group where he advises clients on a wide variety of commercial real estate and business transactions, including the acquisition, sale, financing, development and leasing of commercial properties. Stagnaro earned his law degree from The Ohio State University Moritz College of Law, cum laude, in 2018, where he served as Managing Editor for the Ohio State Business Law Journal. Stagnaro is admitted to practice law in Ohio.



NOAH M. OLSON is an associate in the firm's Business Representation & Transactions Group, where he assists private and publicly held companies with a wide range of corporate transactions, including secured and unsecured debt financing transactions, real estate financing, acquisition, development, and disposition, mergers and acquisitions, and intellectual property registration and licensing. Olson earned his law degree from the Donald P. Klekamp College of Law at the University of Cincinnati in 2023, magna cum laude. Olson is admitted to practice law in Ohio.



Share firm news with us at
communications@cincybar.org

THANK YOU TO OUR 2026-27 SUSTAINING MEMBERS

Thank you to our Sustaining Members for your investment in our profession and our community! Our association would not be the strong and vibrant entity it is without the additional support provided by our Sustaining Members. They are an important partner in making a difference in our community by allowing the CBA to foster programs that engage our young lawyers, improve our committees, and provide a greater sense of community among our local lawyers.

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Sustaining members help ensure that the CBA can continue to make a difference in the Greater Cincinnati Legal Community. Sustaining members also have access to four levels of exclusive benefits.

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Be recognized in The CBA Report, the annual Legal Directory, on the CBA website and at the Annual Meeting.

\$100

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Complimentary access to select Member events, including the Bench Bar Social as well as all Supporting Member benefits.

\$250

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An On-Demand CLE Pass plus all Supporting and Benefactor Member benefits.

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Cornerstone All-Access Pass, including admission to most CBA social and educational events, as well as all Supporting, Benefactor, and Patron Member benefits.

\$1000

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CINCINNATI ACADEMY OF LEADERSHIP FOR LAWYERS

CALL Now Accepting Applications

The CBA is accepting applications for the 2027 Cincinnati Academy of Leadership for Lawyers (CALL), an innovative program focusing on practical, ethical, and professional issues facing lawyers. Each winter, 25-32 attorneys are selected to participate in CALL. By training lawyers in leadership, professionalism, and community service, CALL provides a lasting impact that reaches beyond the bench and bar. More than 500 lawyers have graduated from CALL; many of these lawyer-leaders are now serving in community courts, non-program boards, and law-related organizations.

CALL's mission is to cultivate, empower and inspire a diverse class of lawyers to realize their full leadership potential. Lawyers will participate in a series of collaborative and experiential programs focused on developing their unique leadership skills and motivating them to put these leadership skills to work in our community.

CALL is open to attorneys who have been in practice for 5-15 years and who graduated law school between 2011 and 2021. Participants are required to attend monthly sessions between January and May and complete a class service project.

For more information or to request an application, contact Kate Lawrence at (513) 699-1401 or klawrence@cincybar.org or apply online at cincybar.org.



The CBA Board of Trustees has approved the following for membership:

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LEGAL SPEED NETWORKING

6:30-8:30 p.m.

OCTOBER
1

Donald P. Klekamp
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University of Cincinnati

Attorneys and law students will rotate through brief one-on-one conversations designed to spark connections, share career insights, and build mentorship opportunities.

Register at cincybar.org



TAKE THE 2026 JUDICIAL CANDIDATE SURVEY

Check Your Inbox in Early September

You, our CBA members, are integral to fulfilling our mission to educate the public.

By taking the time to share your insights on the candidates you work with, voters will have more knowledge as they go to the polls. The Judicial Survey is anonymous, neutral, and unbiased. Its primary purpose is to educate the public.

Judicial Surveys will be sent to the email address on file for members during the month of September.

To confirm or update your email address, please visit your member profile at **cincybar.org**.

For more information about the Judicial Survey visit: **cincybar.org/judicialsurvey**.

The Judicial Survey is a confidential and non-partisan poll that rates judicial candidates on the following characteristics:



Administrative Diligence

Candidate has the ability to run a courtroom in an efficient manner that leads to a timely disposition of matters before the court.



Communication Skills

Candidate communicates in a clear and respectful manner that demonstrates respect for the judicial process.



Community Engagement

Candidate is engaged in meaningful efforts to improve our community.



Integrity/Impartiality/Objectivity

Candidate strives to administer justice in an impartial manner free of explicit or implicit bias.



Legal Experience

Candidate possesses the appropriate knowledge, skillsets, and experience specific to the judicial seat being sought.



Professionalism/Temperament

Candidate has demonstrated professionalism, ethics, and civility toward attorneys and non-attorneys, regardless of their role in the judicial process, political affiliation, or social standing.

CALL

CINCINNATI ACADEMY OF LEADERSHIP FOR LAWYERS

ALUMNI EVENT

An Evening with Former U.S. Attorneys: Civility, Leadership, and the Law

September 23 | 4:30 p.m. | Cincinnati Bar Center

CALL Alumni are invited to an exclusive event.

Three former U.S. Attorneys will join us for a panel discussion on the critical issues facing today's legal leaders moderated by Chief Magistrate Judge Stephanie Bowman.

MODERATOR



Chief Mag. Judge
Stephanie Bowman
U.S. District Court,
Southern District of Ohio

SPEAKERS



David DeVillers, Esq.
Barnes & Thornburg LLP



Benjamin Glassman, Esq.
Squire Patton Boggs



Kenneth Parker, Esq.
Taft, Sstettinius &
Hollister LLP

Join us for a networking reception after the discussion. **RSVP at cincybar.org**

Meet the Candidates

Hamilton County Judicial Forum

Tuesday, October 13 | 6 p.m.

Cincinnati Bar Center | 5th Floor

OPEN TO MEMBERS

The judicial forum provides voters an opportunity to meet the candidates running for judicial office. This nonpartisan event is not a debate, but rather an opportunity for voters to hear about the candidates' experience, judicial philosophy, and plans for the Court.

— The forum will be live streamed on Zoom and Facebook —



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RSVP at cincybar.org

More information at mymembership@cincybar.org





Terrence "Terry" Donnellon

1954 – 2026

Terrence "Terry" Donnellon, 72, passed away on July 30, 2026, surrounded by his family. He was born on April 9, 1954, in Cincinnati, Ohio, to the late Edward and Mary Margaret "Peggy" (Nolan) Donnellon. Terry graduated from Archbishop Moeller High School in 1972 and went on to earn both his bachelor's degree and law degree from the University of Cincinnati. He worked as an attorney for his family's law firm, Donnellon, Donnellon & Miller - Attorneys at Law, for almost 50 years, in addition to serving as the law director for the City of Montgomery for the past 29 years. He married Joyce Gessing on May 28, 1976, in Cincinnati. They shared 50 wonderful years together.

Terry was best known for his love of family and friends, cooking, music, quick wit, and an intense work ethic backed by a sharp legal mind. He was fiercely proud of his Irish heritage.

His grandchildren were the absolute pride and joy of his life, and he supported them by attending sporting events, dance competitions, school plays, performances, and graduations. Terry loved cooking, and sharing food was one of his love languages. He was a founding member of The Smokin' Irish BBQ team and loved cooking for competitions but also used it to show others he cared for them.

Terry was a terrible golfer, yet he never lacked golf buddies. Terry always made sure his friends were well-fed, famously supplying and preparing his signature "Dirty Rice" for the entire group. It was a true testament to his immense generosity, his deep love of cooking, and his joy in bringing people together.

Terry worked full time up until his stroke in June 2026. His clients and the people in the City of Montgomery, his second family, were never far from his mind. He was known for his fairness and integrity, earning the respect of colleagues, elected officials, and members of the public alike. Terry was a generous and caring human being whose kindness and character left a lasting impression on everyone who had the privilege of knowing him. He will be remembered not only for his outgoing and fun personality, but also for the compassion, wisdom, and humanity he brought to every person he met.

Terry is survived by his wife, Joyce Donnellon; his children, Molly (Chris) Simpson, Meghan (Matt) Hyden, Jeff (Amy) Donnellon and Annie (Jamie) Davis; his grandchildren, Maddie, Nick and Finn Simpson, Ellie Hyden, and Michael, William, Jacob and Samuel Donnellon; his brothers, Tom (Alice) Donnellon and Steve (Sherri) Donnellon; and many nieces, nephews, cousins and extended family members. He was preceded in death by his brother, Dan (Carole) Donnellon.



Simon L. Leis, Jr.

1934 – 2026

Simon "Si" L. Leis, Jr. passed away on June 27, 2026 at the age of 92. Born on June 12, 1934 in Cincinnati, OH to Simon Leis, Sr., a Hamilton County Common Pleas Court Judge, and Ida Leis (Suttmiller). Si graduated from St. Xavier High School in 1952, Xavier University in 1956 and entered the U.S. Marine Corps, serving active duty from 1957 to 1960. He received his Juris Doctor degree from Salmon P. Chase Law School in 1965.

Si served as an Assistant City Prosecutor for the City of Cincinnati from 1966 to 1968, Assistant City Solicitor from 1968 to 1969, First Assistant United States Attorney for the Southern District of Ohio from 1969 to 1971 when he was appointed Prosecuting Attorney of Hamilton County, OH. Si was then elected to four-year terms as Prosecuting Attorney of Hamilton County, OH in 1972, 1976 and 1980. He was elected Judge for the Hamilton County Court of Common Pleas in 1982. Si was appointed Sheriff of Hamilton County, OH in 1987, elected Sheriff in 1988 and reelected in 1992, 1996, 2000, 2004, 2008 and retired in 2012. Si's legendary career as a public servant and champion of law and order and the rights of the citizens of Hamilton County include accolades too numerous to mention.

More than his public service and his commitment to the citizens of Hamilton County, Si was a devoted husband of almost 70 years to his wife, Margery; a loving and proud father to his son, Simon Leis III, (deceased), and his daughters, Julie (Raleigh), Jill (Franke) and Jodie (George); and a guiding influence to his grandchildren, Kyle (Natalie) Raleigh, Chelsea Raleigh, Carter Raleigh, Francis Simon Franke, Hal Samuel Franke, Lonny Elijah Franke, McKensie (Johnathan) Lahrman, Bailey (Nathan) Eckberg and Remington George. Cherished great-grandfather of Wrenley and Rhett. Dear brother to Ida Jane Staley. He is also survived by many nieces, nephews, other family members and friends. Si is preceded in passing by his son, Simon L. Leis III, his granddaughter Madison Raleigh, his siblings; Mary Clare Torbeck, Katie Jo Gay, Margaret Leis, and Babs Leis. Si was a true force of nature and will live in our hearts and memories and serve as a guiding light to all of us who were fortunate enough to know or spend time with him. *Semper Fi.*

*Gary F. Franke,
Esquire.*



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1946-2026

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