



Cincinnati Bar
ASSOCIATION

38th Annual Advanced Estate Planning Institute



Up to 5.0 hours CLE credit pending,
including 1.0 hour Attorney Professional
Conduct
Specialization Credit pending



SESSION I – APRIL 26

- 11:50 a.m. Welcome and Introductions**
- 12 p.m. Wealth Planning with Art: Appraising, Transferring, & Selling Art in Estates**
Morgan Rigaud, *Bryson Estates*
- 1 p.m. Case Law Update**
Adam J. Centner, Esq.,
Keating Muething & Klekamp PLL
- 2 p.m. Probate Court Update**
Hon. Ralph E. Winkler,
Hamilton County Probate Court
- 2:30 p.m. Adjourn**

REGISTER ONLINE AT CINCYBAR.ORG

Registration Fees

\$87.50 / session CBA Members
\$125 / session Non-Members

Non-Attorney: 50% off applicable attorney registration fee

Please note: This is a live interactive Zoom webinar that can be viewed by participants on their own computers remotely. Participants will receive up to 5.0 hours of Live CLE credit (pending) for the webinar. After registering for the course, you will receive an email with instructions on how to access the live webinar.

Cancellations received by noon the business day prior to the seminar will be refunded in full minus a \$25 processing fee.

SESSION 2 – MAY 24

- 11:50 a.m. Welcome and Introductions**
- 12 p.m. Securing Client Data and Teleworking: Ethical Concerns and Practical Tips**
David J. Myers, Esq.,
David J. Myers, Attorney at Law
- 1 p.m. The Notary Modernization Act: How to Become an Ohio Remote Online Notary**
C. Allen Nichols, MLS, MBA,
Ohio Notary Services
- 1:30 p.m. Undoing Taxable Gifts: Using Qualified Disclaimers and Other Strategies to Undo or Modify the Tax Effect of Taxable Gifts**
Edwin P. Morrow III, J.D., LL.M. (Tax), MBA,
CFP®, CM&AA®, *Huntington National Bank*
- 2:30 p.m. Adjourn**

INSTITUTE STEERING COMMITTEE:

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