Estate Planning and Probate Practice for Paralegals

Chapel Hill, NC • Wednesday, January 25, 2012

PRESORTED
STANDARD
U.S. POSTAGE PAID
EAU CLAIRE, WI
PERMIT NO. 2016

HalfMoon LLC
PO Box 278
Altoona, WI 54720-0278

5 reasons you won't want to miss this seminar!

1. You'll learn about estate planning to accomplish tax planning and long term care planning goals.
2. You'll review the probate process, including the handling of creditors' claims.
3. You'll study the process for creating and terminating guardianships.
4. You'll examine how to avoid conflicts of interest.
5. You'll explore durable powers of attorney for health care and finance.

Register online at: www.halfmoonseminars.com

HalfMoon LLC presents:

Estate Planning and Probate Practice for Paralegals

Chapel Hill, NC • Wednesday, January 25, 2012

Learn to assist with estate planning

Study the probate process, including preparing the inventory and handling creditors' claims

Review guardianships and alternatives, including powers of attorney

Examine ethical issues in estate planning and probate practice

North Carolina Certified Paralegals
CLE Credit Applied for/Pending

National Association of Legal Assistants
6.0 CLAE Hours (1.0 Ethics)

National Federation of Paralegal Associations
6.0 CLE Hours (1.0 Ethics)

Agenda

Assisting with Estate Planning — *E. Ferranti*

Identifying the goals of the estate plan
- Tax planning, planning for long term care, planning for the distribution of the estate among the beneficiaries

Gathering and organizing necessary information for the estate plan
- Estate planning interviews and questionnaires

Using standard estate planning documents to create the estate plan
- Wills, trusts, powers of attorney and advance directives

Implementing the estate plan
- Executing and distributing documents, funding issues

Assisting in the Probate Process — *P. Clapper*

Reviewing the probate process and its alternatives
Collecting information on the decedent, beneficiaries, assets and debts
Preparing necessary documents to begin the probate process
- Naming the personal representative; filing the petition, schedules and inventory

Handling creditors' claims
- Preparing public notices, classifying debts, disputing claims

Closing the estate
- Preparing the final account
- Making distributions, obtaining releases, closing your file

Assisting with Guardianships — *G. Herman-Giddens*

Using less restrictive alternatives to guardianship
- Durable powers of attorney for health care, financial powers of attorney, living trusts

Establishing a guardianship
- Determination of incompetence, appointment of guardian(s)

Establishing the powers and duties of guardians
- Guardian of the person, guardian of the estate

Filing the required documents during the existence of the guardianship
Terminating the guardianship

Handling Ethical Issues in Estate Planning and Probate Practice — *D. Griffiths*

Identifying your client and avoiding conflicts of interest
Handling issues of client competence
Identifying and reporting abuse and/or neglect

Register online at: www.halfmoonseminars.com

About the Seminar

Wednesday, January 25, 2012

Courtyard by Marriott Chapel Hill (919) 883-0700
100 Marriott Way • Chapel Hill, NC 27517

$249 for one or $229 each for three or more from the same company, registering at the same time. Each registration includes one copy of *Estate Planning and Probate Practice for Paralegals*.

Registration
8:00 - 8:30 a.m.

Morning Session
8:30 - 11:45 a.m.

Lunch (On your own)
11:45 a.m. - 1:00 p.m.

Afternoon Session
1:00 - 4:15 p.m.

It's easy to register. Enroll today!

Pre-registration is recommended. Walk-ins will be accepted if space is available. You will be contacted if any scheduling changes occur. We do not send confirmations.

- **Register online at www.halfmoonseminars.com**
- Return the attached form with check payable to **HalfMoon LLC** to:
  HalfMoon Seminars, PO Box 278, Altoona, WI 54720-0278
- Fax the attached form to **(715) 835-6066**.
- Call **(715) 835-5900** to register over the phone.

Cancellations: Cancel at least 48 hours before the start of the seminar (CST), and receive a full tuition refund, minus a $10 service charge for each registrant. If you cancel after that time, you may choose to apply a credit toward another seminar or the CD/manual package. You may also send another person to take your place.

Earn continuing education credit!

This seminar is open to the public and offers 6.0 CLE hours, including 1.0 ethics hour, for paralegals and legal assistants. HalfMoon LLC has applied to the North Carolina State Bar Board of Paralegal Certification for CLE credit for North Carolina certified paralegals. The application is under review, and current credit information can be found at www.halfmoonseminars.com.

The National Association of Legal Assistants and the National Federation of Paralegal Associations have each approved this course for 6.0 CLE hours, including 1.0 ethics hour.

Attendance will be monitored and reported for North Carolina certified paralegals, as requested. Attendance certificates will be available after the seminar for most individuals who complete the entire event. Attendance certificates not available at the seminar will be mailed to participants within fifteen business days.

CD/Manual Package: An audio recording of this seminar is available for $259 (including shipping). Allow five weeks from the seminar date for delivery. Please refer to specific state licensing rules or certification requirements to determine if this learning method is eligible for continuing education credit.

Faculty

Erica Ferranti *Attorney with Armor Trust in Raleigh*
Ms. Ferranti practices in trusts and estate planning, disability planning, charitable gift planning, asset protection, business succession planning, and estate administration and guardianship. She is admitted to the practice of law in North Carolina. Ms. Ferranti received a B.A. degree, with honors, from the University of Iowa and a J.D. degree from the University of Iowa College of Law. She is a member of the North Carolina Bar Association (Member, Estate Planning & Fiduciary Law Section, NCBA Scholarship Committee), the Wake County Bar Association, the Wake County Estate Planning Council, and the Tenth Judicial Bar.

Patricia F. Clapper *Legal assistant of Levine & Stewart in Chapel Hill*
Ms. Clapper is a NALA Certified Legal Assistant specializing in litigation, and is certified by the North Carolina State Bar. She is an active member of the North Carolina Paralegal Association, the National Association of Legal Assistants and the North Carolina Advocates for Justice – Legal Assistants Division. She has served in many positions with the North Carolina Paralegal Association, including president. Ms. Clapper also serves on the curriculum advisory board for the paralegal program at Central Carolina Community College in Sanford and serves on a committee with the North Carolina State Bar Board of Paralegal Certification.

Gregory Herman-Giddens *Attorney and president of TrustCounsel in Chapel Hill*
Mr. Herman-Giddens has been practicing law for 23 years with expertise in estate planning, probate, trust administration, asset protection, guardianship and taxation. He is a Board Certified Specialist in Estate Planning and Probate Law as well as a Certified Financial Planner. Mr. Herman-Giddens obtained a B.A. degree from the University of North Carolina at Chapel Hill, a J.D. degree from the Tulane Law School, and an LL.M. degree in Estate Planning from the University of Miami School of Law. He is a member of the North Carolina Guardianship Association and has been certified as a Registered Guardian. He is a frequent speaker and contributor to legal and other publications. Mr. Herman-Giddens is the publisher of the nationally recognized and syndicated North Carolina Estate Planning Blog.

Debra A. Griffiths *Associate with Sandlin & Davidian, P.A., in Raleigh*
Ms. Griffiths' practice is limited to family law. She is a Family Law Specialist certified by the North Carolina State Bar Board of Legal Specialization, and is a court approved parenting coordinator. Ms. Griffiths received her B.A. degree in Psychology with a minor in Business Administration from East Carolina University and her J.D. degree from North Carolina Central School of Law. She is admitted to practice law in North Carolina. She is a member of the Wake County and 10th Judicial District bar associations, and the Family Law Section of the North Carolina Bar Association. Ms. Griffiths serves on the Bench/Bar Liaison Committee for the North Carolina Bar Association as well as the Adoption and Social Committees for the Family Law Section of the North Carolina Bar Association. Ms. Griffiths is a co-editor of *Family Forum* and the 3rd Edition of the *Family Law Deskbook*, both publications by the Family Law Section of the North Carolina Bar Association. Prior to becoming an attorney, Ms. Griffiths worked as a paralegal in the areas of residential real estate, social security disability, estate planning and guardianships.

Estate Planning and Probate Practice for Paralegals

Wednesday, January 25, 2012

( ) **Yes, I will attend** – Chapel Hill, NC - Wednesday, January 25, 2012
$249 for a single registrant or $229 each for three or more from the same company registering at the same time. (Manual included.)

( ) **No, I am not attending.** Please send me the CD/Manual Package: $259 (Shipping and handling included.) Product will ship UPS. Allow five weeks from the seminar date for delivery. Will not ship to PO boxes.

( ) **Check payable to HalfMoon LLC**
(___ Yes, I was pre-registered by phone or fax.)

( ) **Credit Card** *MasterCard, Visa, American Express, or Discover.*

Card Number: ....

Expiration Date: ....

Cardholder Name: ....

Signature: ....

Email: ....

Email is used for credit card receipt and program changes only.

( ) ♿ I need special accommodations. Please contact me.

Complete the following for each registrant.
Attach duplicate forms if necessary.

Company/Firm: ....

Address: ....

City: .... State: .... Zip: ....

Phone Number: ....

Name: ....

Position: ....

Name: ....

Position: ....

Name: ....

Position: ....

Detach entire panel. Send via fax to 715-835-6066 or by mail to HMS, PO Box 278, Altoona, WI 54720-0278.

Program # 12007

Printed on recycled paper.