



## **PLANNING FOR THE FUTURE: PREPARING SIMPLE WILLS, POWERS OF ATTORNEY, AND ADVANCE DIRECTIVES**

**THURSDAY, SEPTEMBER 26, 2019**

**9:30 AM–12:15 PM**

**Office of the Ohio Attorney General 150 E. Gay Street  
Columbus, OH**

Application has been made to the Supreme Court of Ohio for 2.50 CLE Credits, including .5 hours of professional conduct (designated with \*)

### **PROGRAM DESCRIPTION**

This program is designed to assist volunteer attorneys and paralegals who are participating in the Seniors Referral Project, which matches low-income seniors seeking estate planning and advance directives help with pro bono lawyers from the Office of the Ohio Attorney General and private sector. Attorneys and paralegals help low-income seniors with their basic estate planning documents, including simple wills, health care powers of attorney, living wills, organ donor registry, declaration of funeral arrangements, and financial powers of attorney. The training will conclude with a 30 minute discussion of the importance of pro bono service and access to justice, including feedback from current volunteers.

### **AGENDA**

9:30-10:00—**Probate Avoidance**

10:00-10:30—**Preparing a Simple Will**

10:30-10:45—**Break**

10:45-11:15—**Advance Directives**

11:15-11:45—**Practical Considerations and Referral Procedures**

11:45-12:15\*—**Access to Justice, the Importance of Pro Bono Service, Current Volunteer Input**

## FACULTY

**Paul Bryson** is a staff attorney on the Consumer team at the Legal Aid Society of Columbus. He recently transitioned to LASC from his own practice, where he advised clients regularly on estate planning and wealth transfer and represented executors and administrators in Probate court. Paul's projects at LASC include wealth preservation and intergenerational wealth planning aimed at seniors in low-income areas of Columbus. He earned his J.D., summa cum laude, in 2010 from Capital University Law School and his B.A., summa cum laude, in 2006 from Capital University. He is admitted to the bars of Ohio, the U.S. District Court for the Southern District of Ohio, and the U.S. Bankruptcy Court for the Southern District of Ohio.

**Jane Marx** joined Carlile Patchen & Murphy in August 2000 and practices estate and business planning, probate, probate litigation, business succession planning, and elder law. Jane counsels individuals, business owners, executives and caregivers on matters of estate planning, estate & gift taxation, income taxation of trusts & estates, charitable giving, business succession and probate. She provides comprehensive planning for disability, including counseling on special needs and elder law issues. Jane assists executors, trustees, guardians, and other fiduciaries in complying with various legal and fiduciary responsibilities. Jane is the current chair of the firm's Family Wealth & Estate Planning group and is a fellow in the American College of Trust and Estate Counsel (ACTEC). Jane received her law degree from The Ohio State University College of Law. She received her Bachelor of Arts in both English Literature and Economics from Denison University, cum laude.

**Andrew Marvin** joined Carlile Patchen & Murphy LLP in 2018. His practice is centered around estate planning for individuals and business owners. He focuses in the areas of estate planning and trust & estate administration, handling complex estate and tax planning matters and business succession planning matters. He received his undergraduate degree from Kent State University and his law degree from The University of Louisville Brandeis School of Law.

**Dianna Parker** is the Community Engagement Team Managing Attorney for LASC and Southeastern Ohio Legal Services. A 2005 graduate of Moritz College of Law, and 2002 graduate of Northwestern University, Dianna started her career at the Equal Justice Foundation as an Equal Justice Works Fellow, advocating for the education rights of students experiencing homelessness. She has practiced in the areas of education and housing law.

## Registration

This training is free to any attorney currently participating in (or committed to participate in) a LASC or SEOLS Pro Bono Project. All others should submit a \$110.00 fee.

Preference will be given to participants in or those interested in the Seniors Referral Project. To register, please complete an online form here: <https://oslsa.wufoo.com/forms/w12nt7qx0mx5o5y/>

Unless a hard copy is specifically requested, materials will be e-mailed to participants in advance of the training. Thank you for helping us save resources!

*LASC does not discriminate against any person on the basis of race, color, national origin, disability, or age in admission, treatment, or participation in its programs, services and activities, or in employment.*

