

**ESTATE PLANNING AND ADMINISTRATION CONSIDERATIONS**

**SPONSORED BY THE WEST SHORE BAR ASSOCIATION  
IN PARTNERSHIP WITH  
THE ROCKY RIVER MUNICIPAL COURT**

**WHEN: FRIDAY, JULY 20, 2018  
8:30 AM-11:45 AM (CHECK IN FROM 8:00-8:30 AM)**

**WHERE: DON UMERLEY CIVIC CENTER  
(across the parking lot from the RR Municipal Court)  
21016 HILLIARD BLVD  
ROCKY RIVER, OHIO 44116**

**HOURS: APPROVED FOR 3.0 GENERAL CLE CREDIT HOURS**

**FEE: \*\$75.00 VIA CHECK MADE PAYABLE TO:  
WEST SHORE BAR ASSOCIATION (WSBA)**

**\*ACTIVE MEMBERS OF THE WSBA GET A \$25 DISCOUNT**

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**REGISTRATION FORM  
(PLEASE TYPE OR PRINT)**

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NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

SUPREME COURT NUMBER \_\_\_\_\_

EMAIL ADDRESS \_\_\_\_\_

PLEASE MAKE CHECK PAYABLE TO WEST SHORE BAR ASSOCIATION (WSBA) IN THE AMOUNT OF \*\$75.00 (\$50 if WSBA member). PLEASE MAIL THIS REGISTRATION FORM, ALONG WITH YOUR CHECK TO:

TIMOTHY J. CLEMENS, ESQUIRE  
P.O. BOX 110366  
CLEVELAND, OHIO 44111

**REGISTRATION IS LIMITED-SEATS WILL BE ASSIGNED ON A FIRST REGISTERED BASIS**

# EMERGING ISSUES IN ESTATE PLANNING AND ADMINISTRATION

**JULY 20, 2018**

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**8:00-8:30AM CHECK IN**

**8:30-9:30AM IS THE CLOUD FINALLY LIFTING? PRACTICAL PLANNING  
FOR AND ADMINISTRATION OF DIGITAL ASSETS IN OHIO**

*Presenter: David M. Lenz, Esquire*

Our clients' personal and financial lives are increasingly lived online, presenting a variety of complications for estate planning and administration. In April 2017, the Revised Uniform Fiduciary Access to Digital Assets Act became law in Ohio. This presentation will provide an overview of what digital assets are, why estate planners and their clients should care about them, why they operate in a fundamentally different legal background than other assets, and what practical steps people can take to plan for these assets under the new Ohio law.

**9:30-10:30AM OHIO PROBATE LITIGATION: COMMON PROBLEM AREAS**

*Presenter: Aanchal Sharma, Esquire*

Including discussion of the following topics: Subject Matter Jurisdiction – Exclusive; Concurrent Will Contest Actions and the Attorney-Client Privilege; and Attorneys Fees in Probate Litigation.

**10:30-10:45AM BREAK**

**10:45-11:45 THE “ART” OF INHERITANCE**

*Co-Presenter: M. Elizabeth Monihan, Esquire*

*Co-Presenter: Colleen Meredith, Esquire*

Senate Bill 232, effective March 17, 2017, clarified the inheritance rights of posthumously born ART (Assisted Reproductive Technology) children, and in some circumstances allows for posthumously born ART children to inherit. The presentation will address how the new law affects current estate planning documents, drafting considerations for new estate planning documents, and control of genetic material. Additional consideration will be given to estate and trust administration issues raised by the new law.

## **Presenters' Biographies**

**DAVID M. LENZ** is a partner at Schneider Smeltz Spieth Bell LLP where his practice focuses on planning for and administering wealth transfer for individuals and families. David helps families develop comprehensive plans including complex charitable, retirement, and tax planning strategies while also paying attention to often-overlooked but emotionally significant items such as planning for digital assets or pets. David also advises a variety of family foundations and public charities on various tax compliance and governance matters.

**AANCHAL SHARMA** is an attorney in Schneider Smeltz Spieth Bell LLP's litigation practice group. Aanchal has developed particular experience in the areas of business litigation; commercial real estate; and trust, estate, and probate litigation. Aanchal works with clients to find solutions to complex legal problems by examining various dispute resolution options, whether it be mediation, arbitration, trial or settlement. She believes in making her clients aware of all available options, risks and benefits to ensure they feel comfortable and in control during legal proceedings.

**M. ELIZABETH (LISA) MONIHAN** is a partner at Schneider Smeltz Spieth Bell LLP, and focuses on wealth transfer planning, including tax planning, trust and estate administration, multi-generational issues, planning for retirement, closely-held business successions, and charitable gifts. Lisa establishes personal, long-term relationships with her clients, and guides them with empathy and compassion through their legal, tax, financial and family issues.

**COLLEEN MEREDITH** is an attorney in Schneider Smeltz Spieth Bell LLP's Trusts and Estates Group. Colleen's practice focuses on the areas of estate planning, estate administration, probate and trust litigation, and estate and gift tax planning. Prior to becoming a lawyer, Colleen was a Registered Nurse, which gives her a unique perspective into family dynamics and decision making. This insight helps her to guide clients as they deal with personal and complex estate planning issues.