

AGENDA

Joint Meeting of Probate Law and Estate & Gift Tax Committees of the CBA

Tuesday, March 14, 2006

- I. Attendance, Welcome and Introductions: Please sign attendance sheet and update your email address if necessary. Any new members of the committee should feel free to introduce themselves at the onset of the meeting.

- II. Minutes Submitted from Prior Meeting: There are no meeting minutes for the Probate Law Committee's last meeting. The speaker was Richard Taps, and his materials are available at the Columbus Bar Association's website.

- III. Announcements:
 - A. Meeting Dates - Our committee meetings will take place on the second Tuesday of each month, unless notified otherwise. The Probate Law Institute is scheduled for April 26, 2006. A brochure is available with today's materials. Due to the Probate Law Institute, there will not be a committee meeting in April. Our next scheduled meeting is May 9, 2006. We are having another joint committee meeting with the Estate and Gift Tax Committee. Our speaker will be David Duren, Esq., who will cover estate tax returns.
 - B. Meeting Notices – Meeting notices are posted in The Daily Reporter, on the CBA website, and will be sent out via email.
 - C. Future Topics – We are reviewing a few possible topics, such as a Guardianship Panel, the Ohio Uniform Trust Code, Ethical Considerations in the Sale or Closing of a Law Practice, and Tort Reform Effect on Wrongful Death Matters. All members should feel free to suggest topics for future meetings.

- IV. Old Business:
 - A. 2006 Columbus Bar Briefs schedule – We encourage our members to volunteer to write probate-related articles for Columbus Bar Briefs. A schedule of deadlines for submitting an article is attached.
 - D. Columbus Bar Association's website – Within certain limitations, we have the ability to post useful information regarding our area of practice for our committee members.

- V. New Business: If members have new business that they would like to have included on our meeting agenda, we will attempt to do so, time permitting.
 - A. Ohio Trust Code – We will try to keep you apprised of the status of the proposed

Ohio Trust Code. It has passed the House and is currently before the Senate. The full text of the bill as passed by the House is available online at www.legislature.state.oh.us. You will need to enter HB 416. It is my understanding that if the bill is enacted in 2006, it will become effective January 1, 2007.

B. Statutory Financial Power of Attorney Form – Substitute HB 246 Creates a statutory form that may be used to create a power of attorney. The effective date will be March 29, 2006. You may view the full text at www.legislature.state.oh.us.

C. Waiver of Attorney-Client Privilege in Probate Disputes – HB 144 will expand the waiver in probate disputes to include the attorney-client privilege. This bill is awaiting the governor's signature.

D. Transfer on Death Deeds – **In re Estate of Scott** case is attached.

E. Probate Law Institute – The Probate Law Institute is Wednesday, April 26, 2006 at the Columbus Bar Association.

VI. Featured Speaker:

Alan S. Acker, Esq.
145 East Rich Street
Fourth Floor
Columbus, OH 43215
614-220-8877

Drafting Wills and Trusts

Mr. Acker's biographical information is attached.

VII. Adjourn: We will attempt to adjourn our meetings at 1:00 P.M. However, if we do run past 1:00 P.M. and you need to leave, please feel free to exit quietly.