

ESTATE PLANNING AND ADMINISTRATION SEMINAR



WEDNESDAY, JULY 30, 2014

8:30 AM Registration and Breakfast

9:00 AM - 1:00 PM

3.0 CLE Credits Pending

Kaye Scholer, LLP

425 Park Avenue

New York, NY

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AGENDA

- 8:30 AM** **Registration and Breakfast**
- 8:50 AM – 9:00 AM** **WELCOME REMARKS**
Thomas Daly, Manager, Legal Assistant Department, Kaye Scholer LLP and Mariana Fradman, NYCPA Treasurer and CLE Chairperson, Senior Legal Assistant, Kaye Scholer LLP
- 9:00 AM - 9:15 AM** **KEYNOTE SPEAKER**
Arlene Harris, Special Counsel, Kaye Scholer LLP
- 9:15 AM – 10:15 AM** **MEDICAID PLANNING FOR SENIORS**
Presented by Roman Aminov, Esq.
- 10:25 AM – 11:20 AM** **CAPACITY, POWERS OF ATTORNEY, HEALTH CARE PROXIES AND LIVING WILLS FOR PARALEGALS**
Presented by Stephen H. Weiner, Esq.
- 11:30 AM – 12:25 PM** **ESTATE LITIGATION FOR PARALEGALS**
Presented by W. Zehava Schechter, Esq.
- 12:25 PM – 12:45 PM** **CLOSING REMARKS**

***CLE Credits Availability: 3 CLE Credits pending**

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SPEAKERS AND OUTLINES

MODERATOR and KEYNOTE SPEAKER

ARLENE HARRIS
Special Counsel

Arlene Harris is a member of the Private Clients Department, Kaye Scholer LLP. She has practiced for more than forty years and focuses on estate and trust litigation, and also practices in the area of estate and trust planning, probate and administration of estates and trusts, and pre- and post-nuptial agreements.

Arlene is a Fellow of The American College of Trust and Estate Counsel, the former Chair of the Executive Committee of the Trusts and Estates Law Section of the New York State Bar Association, and the former Chair and a member of the OCA Advisory Committee on the Surrogate's Courts. She is also a former member of the Surrogate's Court Committee of the City Bar Association, the International Academy of Estate and Trust Law, the New York City Estate Planning Council, and the UJA-Federation Trusts & Estates Specialty Group, which she also chaired. She has lectured frequently and is a former adjunct professor of law at St. John's University School of Law. She is the former Chief Law Assistant of the New York County Surrogate's Court, and a former Assistant Attorney General of the New York State Department of Law.

She has authored chapters on Probate and Administration for the Practical Skills and Forms treatise of the New York State Bar Association and chapters for the New York State Bar Association treatise on Probate and Administration of New York Estates. Arlene has been recognized as a leading wealth management lawyer in Chambers USA: America's Leading Lawyers for Business every year since 2007.

MEDICAID PLANNING FOR SENIORS (60 minutes)

Presented by Roman Aminov, Esq.

1. Overview of long term care options for seniors (5 min.);
2. Medicaid *home care* eligibility rule for seniors (5 min.);
3. Medicaid *nursing home* eligibility rules for seniors (5 min.);
4. Medicaid nursing home care transfer penalties and exceptions (5 min.);
5. Medicaid estate recovery and liens – what they are and how to avoid them (10 min.);
6. Practical Medicaid planning techniques- outright gifts, life estate, and trusts (15 min.);
7. Case studies – examples of Medicaid plans (5 min.);
8. Questions and Answers (10 min.).

Roman Aminov graduated with a bachelor of science in real estate development from Baruch College and received his J.D. from St. Johns School of Law, where he focused on trusts and estates. Roman established his estate planning and elder law firm in 2011, with his main office in Queens. He is a regular columnist in the Chazaq Magazine and the Jewish Home, writing on estate planning and elder law topics. He has also been a guest lecturer for the [Orthodox Union](#) on estate planning.

***CAPACITY, POWERS OF ATTORNEY, HEALTH CARE PROXIES
AND LIVING WILLS FOR PARALEGALS (55 Minutes)***

Presented by Stephen H. Weiner, Esq.

1. Capacity (10 min.)
2. Power of Attorney forms and execution in New York (10 min.)
3. Power of Attorney: practice issues (10 min.)
4. Health Care Proxies and Living Wills (15 min.)
5. Questions and Answers (10 min.)

Stephen H. Weiner is an attorney with a practice in the areas of estate planning and estate litigation. He is a Court Examiner of Guardianships in the First Department. He has been a member of the bar of the State of New York since 1985. Mr. Weiner is a member of the Trust and Estates Committee and the Elder Law Committee of the New York State Bar Association. He graduated from Yale College in 1981 (B.A.) and Columbia University School of Law in 1984 (J.D.). Mr. Weiner worked at law firms as a litigation associate, including Cahill Gordon & Reindel and Schulte Roth & Zabel, before starting his own practice in 1993. He has been lead counsel in trials in federal court and state court, including jury trials.

Mr. Weiner lives in western Queens, where he is a member of the Sunnyside Chamber of Commerce. He welcomes LinkedIn invitations from the legal community. Mr. Weiner engaged in public service as President of the Board of Elections of the City of New York in 1999, and as a Commissioner of Elections for nine years.

ESTATE LITIGATION FOR PARALEGALS (55 minutes)

Presented by W. Zehava Schechter, Esq.

1. Review of Testate and Intestate Proceedings (10 min.);
2. The Role of the Paralegal During the Initial Client Meeting and Beyond (10 min.);
3. Tips to Avoid Estate Litigation (10 min.);
4. Contested and litigated probate and administration proceedings (10 min.);
5. Real client cases – the good, the bad, and the could-have-been-(10 min.);
6. Questions and Answers (10 min.).

W. Zehava Schechter, Esq. concentrates her private practice in real estate law, estate planning and estate administration, contracts, and business formation and dissolution. She is admitted to the Bar of New York (1989), Massachusetts (1989), and Israel (1993). Ms. Schechter graduated with a B.A. in Politics in 1983 from Brandeis University and received her J.D. in 1989 from Suffolk University Law School. She serves as the Chairperson and adjunct instructor in the Paralegal Studies Department at Bramson Ort College in New York City. Throughout her 25 year career, Ms. Schechter has practiced in secular courts and Batei Din (Jewish religious courts). She began her career as a public defender with the New York Legal Aid Society, Criminal Defense Division. Her career has included law firm practice as well as sole practitioner status, both in New York and Israel. Ms. Schechter is an active member of a number of networking groups, including the West Hempstead Chamber of Commerce (where she serves as Recording Secretary), SCWEBC, and CNG/JBD, where she is a former director of the organization and the current director of the attorney sub-group.

Ms. Schechter's favorite quote is "You Miss 100% of the Shots You Don't Take" (attributed to Wayne Gretzky). In addition to her law practice, Ms. Schechter is a certified New York State Court Interpreter in the Hebrew Language, a certified New York State *Guardian Ad Litem*, an author, a frequent contributor of newspaper articles on legal issues of note, and the owner of a successful custom window treatment business, Your Shady Window Lady, LLC.