

Agenda

Understanding the Grantor's Goals and Potential Risks

M. Deliberato

- Long-term and short-term financial goals
- Identifying beneficiaries
- Identifying assets and potential risks
- Objectives for asset management and control
- Creation, duration, and termination of trust

Creating Revocable "Living" Trusts

M. Deliberato

- Purposes of the revocable trust
- Benefits and drawbacks
- Funding the trust
- Administrative issues

Creating Irrevocable "Living" Trusts

M. Menninger

- Purposes of the irrevocable trust
- Benefits and drawbacks
- Funding the trust
- Administrative issues

Creating Testamentary Trusts

M. Menninger

- Purposes of the testamentary trust
- Benefits and drawbacks
- Funding the trust
- Administrative issues

Asset Protection Planning for Seniors and the Disabled

R. Houck

- Overview of government benefit programs
- Trust options
- Planning for spouses, supplemental needs trusts



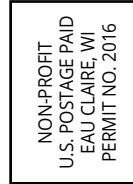
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All About Trusts in Ohio

Live, Interactive Webinar - Thursday, October 31, 2024



HalfMoon Education Inc.
PO Box 278
Altoona, WI 54720-0278



Learning Objectives

You'll be able to:

Identify your clients' short-term and long-term financial goals.

Discuss clients' objectives for asset management and control.

Understand the benefits and drawbacks of revocable and irrevocable living trusts.

Learn about the creation, duration and termination of trusts.

Use trusts and other estate planning techniques for asset protection planning for seniors and clients with disabilities.

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All About Trusts in Ohio

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Understand the grantor's short-term and long-term financial goals

Identify objectives for management and control of assets

Create revocable and irrevocable "living" trusts

Explore tax consequences of trusts

Create testamentary trusts

Use trusts and other estate planning techniques for asset protection planning

Continuing Education Credits

Attorneys

6.0 CLE Hours

Accountants

7.2 CPE Credits



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Webinar Information

Online - Thursday, October 31, 2024

Log into Webinar: 8:00 - 8:30 am EDT

First Session: 8:30 - 11:00 am EDT

Break: 11:00 - 11:30 am EDT

Second Session: 11:30 am - 1:00 pm EDT

Break: 1:00 - 1:30 pm EDT

Third Session: 1:30 - 3:30 pm EDT

Tuition

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Faculty

Matthew D. Deliberato

Principal and founder of The Deliberato Law Center, LLC in Independence, OH
Mr. Deliberato's practice is focused on estate planning that incorporates wills, trusts, and powers of attorney for administration and healthcare to protect the assets of an individual that have been earned over a lifetime. His elder law practice counsels clients on how to plan for nursing home care and how to establish successful Medicaid planning strategies. Mr. Deliberato was born and raised in Garfield Heights, Ohio. He attended St. Ignatius High School in Cleveland and graduated from the Loyola University, Chicago. He began his professional career as a fourth generation Funeral Director. After one short year, he returned to school at the Cleveland Marshall College of Law. He started Deliberato law firm in 1999. He is an active community member, having served on several boards, including the Garfield Heights Financial Oversight Committee, the Northeast Ohio Planned Giving Commission, and the Knights of Columbus.

Mike Menninger, OSBA Certified Specialist

Owner/Attorney at Houck Menninger Law, LLC
Mr. Menninger has been a full-time estate planner since 2014. He is one of only approximately 155 attorneys in Ohio that is certified as a specialist in estate planning, trust and probate law by the Ohio State Bar Association (OSBA). Mr. Menninger helps families implement simple and complex estate planning strategies, advising on tax and asset protection considerations, and educating and counseling clients along the way. He has served as faculty for the OSBA, Wealth Counsel State Forums, the National Business Institute, and Strafford Publications, among other organizations. He has taught attorneys and CPAs on a variety of subjects, including basic estate planning, trust taxation, IRA planning, and irrevocable trust modification. Recently, he was recognized by *Ohio Lawyer Magazine* as a Rising Star in Estate Planning. Mr. Menninger received his J.D. degree from Northern Kentucky University.

Rachael A. Houck, Esq., CELA

Owner/Attorney at Houck Menninger Law, LLC
Ms. Houck believes strongly in the ability of seniors to have self-determination in the decision-making process regarding their care. She also believes in compassion, empathy, and listening. Her job is to hear her clients concerns, help them discover unknown or unanticipated issues, and work through them to provide options we implement together. Ms. Houck is honored everyday to be able to build relationships with clients and their families, educating and counseling them through what is one of the most difficult times in their lives. She has earned the title and distinction of being certified as an elder law attorney (CELA) by the National Elder Law Foundation. This certification is the highest level of specialty for elder law attorneys, and it pushes her to remain at the front edge of elder law planning. It allows her to provide the counsel and service her clients and their families need and deserve. Ms. Houck is also certified with the Veteran's Administration to assist in helping war-time veterans and their surviving spouses obtain special benefits to help with long-term care. She earned her J.D. degree from Ohio State Moritz College of Law.

Credit Information

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This webinar has been approved by the Supreme Court of Ohio Commission on Continuing Legal Education for 6.0 general CLE hours.

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