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## Wills and Trusts: Mistakes to Avoid

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December 15, 2016

National Business Institute

**Date:** December 15, 2016

**Time:** 9:00 a.m. - 4:30 p.m.

**Location:** Holiday Inn Cherry Hill | 2175 Marlton Pike | Cherry Hill, NJ 08002

### **Prevent and Correct Top Estate Planning Mistakes**

Some trial and error is a part of any practice, but minimizing the error is an attorney's professional duty. This course will walk you through the most common and the most devastating trusts and estate mistakes and give you the practical tools for their prevention and remedies.

- Identify key mistakes in the choice of estate planning tools and their remedies.
- Scour old estate plans for outdated and ineffective planning techniques.
- Find the right balance between overly broad and needlessly restrictive, inflexible trust language.
- Avoid key executor designation mistakes - clearly define fiduciary powers and duties.
- Get practical tips for correcting past will drafting mistakes.
- Anticipate estate administration implications of improperly titled assets and unfunded trusts.
- Learn how to reflect grantor and beneficiary major life changes in existing documents.

### **SPEAKERS**

**JUSTIN H. BROWN** is a shareholder of Flaster Greenberg PC's trusts and estates, taxation, and business and corporate practice groups. He focuses his practice on estate and tax planning, estate and trust administration, and estate litigation. Mr. Brown is admitted to practice in New Jersey, Pennsylvania and Maryland; and before the U.S. District Court for the District of New Jersey; and the U.S. Tax Court. He is a member of the American, New Jersey State, Pennsylvania, Maryland State, Philadelphia (Education Committee; Probate and Real Property Section), and Camden County bar associations. Mr. Brown also is a member of the Philadelphia Estate Planning Council, and the Estate and Financial Planning Council of Southern New Jersey. He earned his B.A. degree, with honors, from Washington University in St. Louis; his J.D. degree, cum laude, from American University Washington; and his LL.M. degree from Villanova University School of Law.

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**ETHAN ORDOG** is an attorney with Begley Law Group, PC, where he concentrates his practice in estate and trust litigation, estate and trust administration, and guardianship. Mr. Ordog is licensed to practice law in New Jersey and before the U.S. District Court for the District of New Jersey. He is a member of the New Jersey State Bar Association, American Bar Association, and the bar associations of Burlington and Camden counties. Mr. Ordog earned his B.S. degree, cum laude, from Moravian College in Bethlehem, Pennsylvania and his J.D. degree from Roger Williams School of Law in Bristol, Rhode Island.

**DANIEL I. WARD** is the name partner of Daniel I. Ward & Associates, LLC, with his primary office in Voorhees, New Jersey, and satellite offices in Bensalem, Pennsylvania and near West Palm Beach, Florida. He has been in practice for more than 25 years. Mr. Ward concentrates his legal practice in tax, business and personal planning, with an emphasis on sophisticated estate planning and estate administration. He is a member of the American Bar Association, Philadelphia Estate Planning Council, South Jersey Estate Planning Council, Academy of Elder Law Attorneys, Camden County Bar Association, Pennsylvania Bar Association, The Florida Bar, and New Jersey State Bar Association. Mr. Ward graduated from the University of Pennsylvania; earned his J.D. degree, with tax honors, from Rutgers University School of Law; and earned his master's degree from New York University.

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