

MBA Ninth Annual Probate Law Conference

	Monday, Nov. 8	Tuesday, Nov. 9	Wednesday, Nov. 10	Thursday, Nov. 11	Friday, Nov. 12
8:30-9 a.m.	Welcome – Probate and Family Court Chief Justice John D. Casey				
9-10:30 a.m.	Updates in Probate Law and Practice Patricia L. Davidson, Esq., Chair Kaitlyn Sapp, Esq. Marshall D. Senterfitt, Esq.	MassHealth Update John J. Ford, Esq., Chair Lisa M. Neeley, Esq. Daniel M. Surprenant, Esq.	Real Estate Issues in Probate Estates Jennifer A. Maggiacomo, Esq., Chair Christina T. Geaney, Esq. Melissa B. Morrow, Esq.	Remote Depositions During the Pandemic Lisa M. Cukier, Esq., Chair Cara J. Daniels, Esq. Tarae L. Howell, Esq.	Retirement Benefits and the SECURE/CARES Act Thomas J. McCord, Esq.
10:30-11 a.m.	Q&A	Q&A	Q&A	Q&A	Q&A
11 a.m.-12:30 p.m.	Intro to Massachusetts Estate Tax Returns Luke C. Bean, Esq. Ruth Mattson, Esq.	ABCs of Guardianship/Conservatorship James O’Sullivan, Esq., Chair Marlee S. Cowan, Esq. George A. Rodriguez, Esq.	MUPC Updates and E-Filing Anastasia Welsh Perrino, Esq., Chair Tara E. DeCristofaro, Esq. Pamela Casey O’Brien, Esq.	Trial Evidence of Incapacity and Undue Influence Hon. George Phelan Joseph L. Bierwirth, Jr., Esq. Patricia Keane Martin, Esq.	Drafting and Administering Special Needs Trusts That Work Carol Cioe Klyman, Esq. Ken W. Shulman, Esq.
12:30-1 p.m.	Q&A	Q&A	Q&A	Q&A	Q&A
1 p.m. – 2 p.m.	Group Discussion: The Practical Practice – Onboarding the New Client or Setting Sail Without Them Melissa Langa, Esq.	Group Discussion: Attorney Well-Being Heidi Alexander, Esq. Tracey Meyers, PsyD.	Group Discussion: Terminating Estates and Trusts, With or Without the Probate Court Peter M. Shapland, Esq.	Group Discussion: Trustee and Beneficiary Issues (MUTC 813 Duty to Inform and Report, MUTC 1005 Limitations on Actions Against Trustees, and MUTC Limitation on Contesting Validity of Revocable Trusts) Joseph Kropp, Esq.	Group Discussion: Grant to Court for Oversight of Guardians and Conservators Chief Justice John D. Casey John J. Ford, Esq. Wynn Gerhard, Esq. Evelyn Patsos, Esq.