



# Be Prepared: Planning Ahead (for Retirement and Disasters)

Tuesday, June 20, 2017

9:00 a.m. – 12:00 p.m.

BAEC, 438 Main Street, Sun Auditorium, Buffalo, NY  
3.0 CLE credits: 1.0 Ethics, 2.0 Areas of Professional Practice  
(CLE credit appropriate for all attorneys)



Are you thinking about retirement? Are you prepared for an unexpected disaster or sudden incapacity or worse? What will happen to your practice and your clients if something unforeseen happens to you? Do you have a contingency succession plan in place? Have you chosen a reliable responsible successor attorney for your clients? How solid is your retirement plan? Should you sell your practice before you retire? How comprehensive is your health care planning? Do you have long-term care insurance? Will Medicare and Medicaid cover your medical needs? Who will pay your bills and protect your family if you are unable to do so?

The Erie County Bar Foundation, the Erie Institute of Law and the New York State Bar Association are co-sponsoring a continuing legal education program to answer these questions and many others of vital importance to all attorneys, and particularly solo and small firm lawyers. Courtesy of the NYSBA, all attendees will receive a hard copy of the NYSBA *Planning Ahead Guide* (Second Edition, 2016).

**8:30 a.m. Registration/Check-in/Continental Breakfast**

**9:00 a.m. Welcome and Introductions**

Dennis J. Bischof, *Esq.*, *Law Office of Dennis J. Bischof*

**9:05 a.m. Erie County Bar Foundation**

Barbara J. Delgross, *Esq.*, *Erie County Bar Foundation Board Member*

**9:15 a.m. Health Care Planning: Medicare, Medicaid, Veteran's Benefits, LTC Health Issues**

Kelly Barrett *Esq.*, *The Center for Elder Law and Justice*

Anthony Szczygiel, *Esq.*, *The Center for Elder Law and Justice*

**9:45 a.m. Sale or Merger of a Law Practice – Transitioning to Retirement**

Joseph F. Saeli, Jr., *Esq.*, *Colligan Law LLP*

**10:25 a.m. Break**

**10:40 a.m. Contingency and Continuity Planning for Unexpected Disasters – Protecting Clients and Their Lawyers**

Sarah Diane McShea, *Esq.*, *Law Offices of Sarah Diane McShea*

**11:20 a.m. Business Succession Issues, File Preservation and Destruction, Insurance Continuity and Related Financial Issues**

Francis X. Carroll, *Esq.*, *Fidelity National Title Group, Chair, Professional Continuity Committee*

**12:00 p.m. Adjourn**



A special thank you to the ***Erie County Bar Foundation*** for underwriting this program and helping to reduce the cost of registration so as many members as possible are able to attend.

*Erie Institute of Law Registration Form*

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\$50 BAEC Member       \$80 Non-Member       \$20 Hard copy of material\*

**The Erie Institute now provides material via electronic delivery. Please be sure to add your email address below. If you would like a hard copy, check the box above and add \$20 to the registration fee. Thank you.**

*\*(The Planning Ahead Guide will be provided at no cost. This charge pertains to additional handout material from the presenters.)*



Name \_\_\_\_\_

Firm \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_

Zip \_\_\_\_\_ Phone \_\_\_\_\_ Fax \_\_\_\_\_

E-mail \_\_\_\_\_

Enclosed is my check in the amount of \$\_\_\_\_\_  Visa  MC

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**Accreditation:** The Erie Institute of Law has been certified by the New York State Continuing Legal Education Board as an accredited provider of continuing legal education in the state of New York.

**Cancellation Policy:** If you are unable to attend a seminar for which you have already registered, call the CLE department at 852-8687. For a full refund, notice of your cancellation must be received 48 hours in advance of a program. **Cancellations received less than 48 hours in advance are subject to a \$10 administrative fee.** Registrants who are pre-registered and fail to attend will receive course materials in lieu of a refund.

**Mail or Fax to:** Erie Institute of Law, 438 Main Street, Sixth Floor, Buffalo, New York 14202, (716) 852-8687, Fax (716) 852-7641. Register online at [www.eriebar.org](http://www.eriebar.org). **Tuition assistance available. Please call to request an application.**