March 18 - Day One
3.0 CLE credits: 0.5 Ethics, 1.5 Areas of Professional Practice, 1.0 Skills (CLE credit appropriate for all attorneys)

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

9:00 a.m.  Welcome and Introductions
James J. Duggan, Esq., Chair, Professional Continuity Committee
Erie County Bar Foundation Board Member

9:15 a.m.  Managing Your Practice as an Asset
Joseph F. Saeli, Jr., Esq., Colligan Law LLP

9:45 a.m.  Financial Planning Issues: The Importance of Saving/Investing to Fund Your Future
Jensen, Marks, Langer & Vance LLC

10:35 a.m.  Break

11:00 a.m.  Record Keeping
James J. Duggan, Esq., Duggan Pawlowski & Cooke LLP, Chair, Transition Committee

11:15 a.m.  Document Preservation and Destruction; Business Succession Issues
Francis X. Carroll, Esq., Fidelity National Title Group

12:00 p.m.  Adjourn

April 22 - Day Two
3.0 CLE credits: 0.5 Ethics, 1.5 Areas of Professional Practice, 1.0 Skills (CLE credit appropriate for all attorneys)

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

9:00 a.m.  Welcome and Introductions
James J. Duggan, Esq., Chair, Professional Continuity Committee
Erie County Bar Foundation Board Member

9:15 a.m.  Health Care Aspects of Retirement Planning
Medicare Issues – Kelly Barrett Sarama, Esq., Center for Elder Law and Justice
Medicaid Issues – Frank Vavonese, Esq., Smith Vavonese, LLP

10:05 a.m.  Long Term Care Insurance/Social Security Elections
Kelly R. Gusmano, Esq., Woods Oviatt Gilman LLP

10:35 a.m.  Break

10:50 a.m.  Ethical Considerations and Planning Ahead for Unforeseen Contingencies
Roderick Quebral, Esq., Retired

11:30 a.m.  Should I or Should I not Retire? A Lawyers’ Experience
John J. Molloy, Esq., Law Office of John J. Molloy, Retired

12:00 p.m.  Adjourn
Erie Institute of Law Registration Form

Long Term Planning for Managing Your Practice:
Practical Strategies for Organizing Your Office for the Future
Wednesday, March 18, 2020 and Wednesday, April 22, 2020
3.0 CLE credits per day, 6.0 CLE credits for full program
(CLE credit appropriate for all attorneys)

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