

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

BAEC, 438 Main Street, Sun Auditorium, Buffalo, NY

Program generously sponsored by the Erie County Bar Foundation.



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
- 11:50 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
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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

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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)

BAEC MEMBER REGISTRATION:

Due to a generous foundation from the Erie County Bar Foundation, registration has been greatly reduced for BAEC members.

\$40 - 3/18 Session \$40 - 4/22 Session **Attend both and save! - \$75.00**

\$10 Hard copy 3/18 \$10 Hard copy 4/22

NON-MEMBER REGISTRATION:

\$110 - 3/18 Session \$110 - 4/22 Session **Attend both and save! - \$150.00**

\$10 Hard copy 3/18 \$10 Hard copy 4/22

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 amount to the registration fee. Thank you.

Name _____

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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. Tuition assistance available. Please call to request an application.