

HalfMoon Education Live Continuing Education Webinars

# Florida Trust and Estate Practice for Paralegals

Online - Friday, December 20, 2024 | 8:30 am - 4:40 pm EST

**Credits:** Paralegals: 6.5 CLE Hours (Incl. 1.0 Ethics Hour)

National Federation of Paralegal Associations:  
6.5 CLE Credits (Incl. 1.0 Ethics Credit)

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### **Assisting with Estate Planning**

*E. Gross*

- Identifying the goals of the estate plan: planning for retirement, planning for long term care, planning for the distribution of the estate, tax planning
- Gathering and organizing necessary information for the estate plan
  - Estate planning interviews and questionnaires
- Using standard estate planning documents to create the estate plan
  - Wills, trusts, powers of attorney and advance directives
- Implementing the estate plan
  - Executing and distributing documents, funding issues

### **Assisting with Guardianships and Lesser Restrictive Means**

*J. Leon, Esq.*

- Using less restrictive alternatives to guardianship: durable powers of attorney, health care powers of attorney, living trusts
- Establishing a guardianship: determination of incompetence, appointment of guardian
- Establishing the powers and duties of guardians
  - Guardian of the person, guardian of the property
- Filing the required documents during the existence of the guardianship
- Terminating the guardianship/suggestion of capacity

### **Handling Ethical Issues in Estate Planning and Probate Practice**

*S. Abukhodeir, Esq.*

- Identifying your client
- Avoiding conflicts of interest
- Handling issues of client competence

### **Beginning the Probate Process**

*C. DiLella Freidzon, Esq.*

- Reviewing the probate process and its alternatives
- Collecting information on the decedent, beneficiaries, assets and debts
- Preparing necessary documents to begin the probate process
- Naming the personal representative, filing the petition, schedules and inventory
- Collecting assets
- Setting up the estate's checking account
- Valuing assets
- Preserving assets

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### **Probate Process: Claims and Notices**

*M. Cabrera, Esq.*

- Notice to creditors and creditors period
- Preparing public notices, classifying debts, disputing, compromising and striking claims

### **Probate Process: Distribution and Discharge**

*Y. Mallol, Esq.*

- Liquidating assets
- Transferring and distributing assets
- Dealing with minor beneficiaries/incapacitated beneficiaries
- Consent and waivers
- Required checklists

### **Presented by**

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### **Tuition**

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## **Credit Information**

This webinar is open to the public and is designed to qualify for 6.5 CLE hours, including 1.0 ethics hour, for paralegals. Paralegal certification is not required to participate in this course.

Courses approved for credit by the National Federation of Paralegal Associations (NFPA) are deemed acceptable for Florida Registered Paralegals (Rule 20-6.1).

This course has been approved by the National Federation of Paralegal Associations (NFPA) for 6.5 total CLE credits, which includes 5.5 general credits and 1.0 ethics credit.

Attendance will be monitored, and attendance certificates will be available after the webinar for those who attend the entire course and score a minimum 80% on the quiz that follows the course (multiple attempts allowed).

### **On-Demand Credits**

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