

OACDL Planning Seminar REGISTRATION FORM

May 14, 2021

Registration Form:

Name _____

OSC Bar Number _____

Address _____

City _____ State _____ Zip _____

Phone _____

Email _____

Payment:

- Morning Session Only
- \$150.00 OACDL Member \$125.00 OACDL Public Defender Member
- \$205.00 OACDL Non-Member \$175.00 OACDL Non-Member Public Defender
- \$75.00 Retired Member

No phone registrations, please. Cancellations must be received by 5:00 p.m. on Wednesday, May 12 to receive a refund.

Make checks payable to OACDL and send to OACDL (address above), or - credit card information:

Visa MasterCard Discover American Express

Amount to be charged _____

Card Number _____

Expiration Date _____ Security Code _____

Billing Address _____

Billing Zip _____

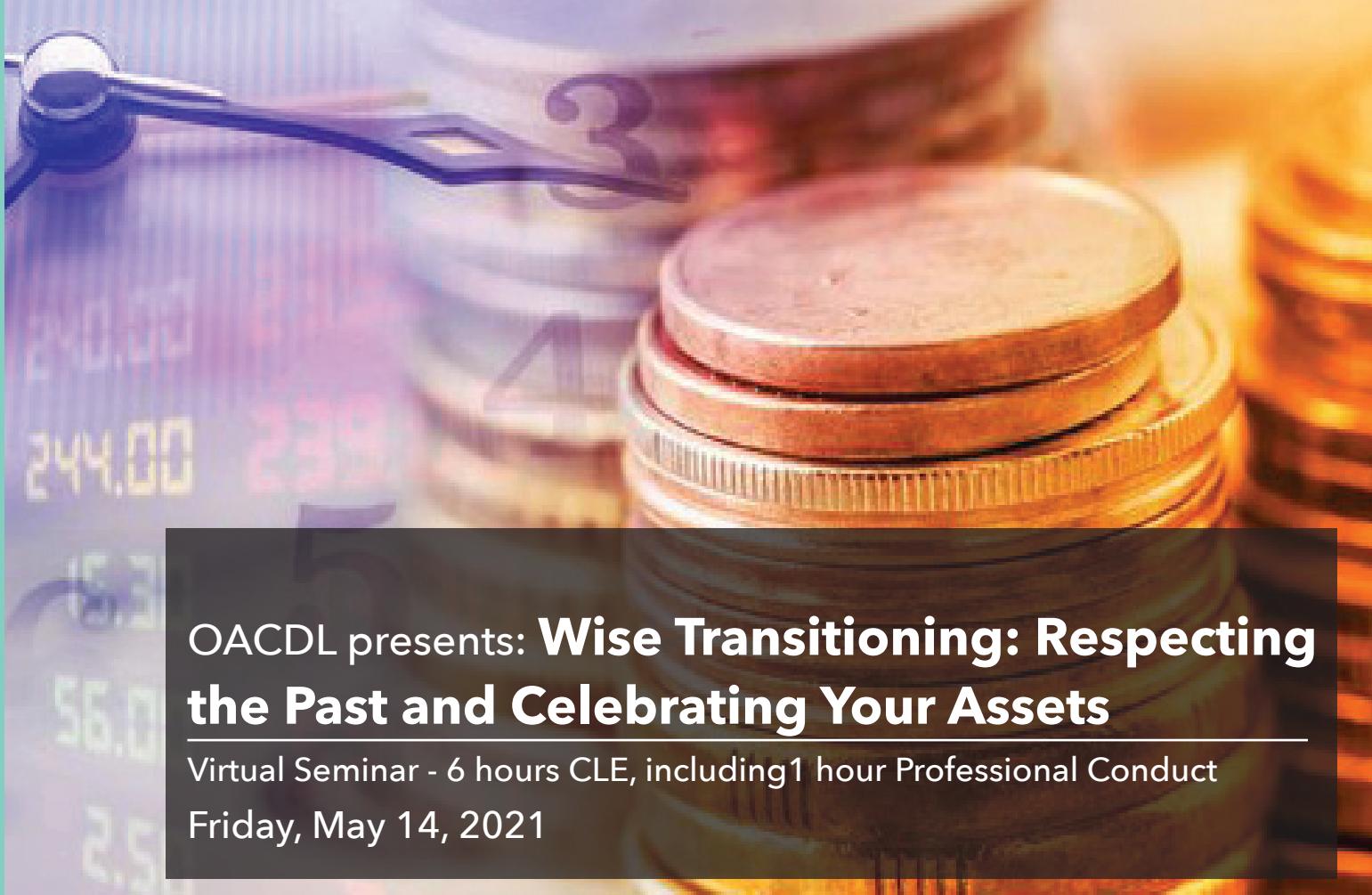
Signature _____

CLE Credit Hours: pursuant to Rule X of the Government of the Bar, the sponsor has requested 6.00 hours of credit, including 1 hour of Professional Conduct, from the Supreme Court Commission on Continuing Legal Education. Participants must apply through the CLE sponsor for credit. All attorney registrants must indicate their Ohio Registration Number (as issued by the Ohio Supreme Court) on the registration form. All attendees must return completed CLE forms to OACDL at the end of the seminar

Register online at www.oacdl.org

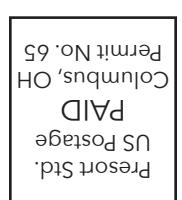
Mail or Fax Payment to:

OACDL
713 S. Front Street
Columbus, OH 43206
fax: 740.654.6097



OACDL presents: **Wise Transitioning: Respecting the Past and Celebrating Your Assets**

Virtual Seminar - 6 hours CLE, including 1 hour Professional Conduct
Friday, May 14, 2021





AGENDA

Friday, May 14, 2021

Wise Transitioning: Respecting the Past and Celebrating Your Assets

6.00 CLE hours

8:30 - 9:00 a.m. Registration and Welcome
Meredith O'Brien, President, OACDL

9:00 - 10:00 a.m. Growing and Maintaining Your Assets - setting up retirement accounts; having a financial plan; investing for the future; PERS and SS

Craig Constantinovich, John E. Sestina and Company

10:00 - 10:15 Break

10:15 - 11:15 Protecting Your Health and Your Assets - liability insurance; health insurance options

Douglas Johnson

11:15 - 12:30 Estate Planning for Lawyers - wills, trusts, POA with special features, living will

Ted Gudorf, Carol Holm

12:30 - 1:30 p.m. Lunch

1:30 - 2:30 p.m. Health and Mental Health as One Adds Decades

Ann Anzalone, M.S.

2:30 - 3:30 p.m. The Professional Pitfalls of Mental Health Issues for Lawyers - mental and cognitive issues for lawyers; what to expect of your mental and cognitive health as you age and practice in the later years of your life and what to do when you are having problems and need assistance

Scott Mote, Ohio Lawyers Assistance Program

3:30 - 4:15 p.m. Closing a Practice in an Emergency Situation - a checklist for everyone

James Tesno

4:15 - 4:30 p.m. Break

4:30 - 5:00 p.m. How to retire in style and go out with class

Carol Holm, Chuck Strain, Joseph Humpolick

OACDL Seminar BIOGRAPHIES

Craig Constantinovich

The comprehensive planning that John E. Sestina and Company offers is what first drew Craig Constantinovich to the firm. "I believe in analyzing each aspect of a person's finances in order to assure the most wide-ranging plan is developed," he said. Craig has been part of John E. Sestina and Company since 2013. Prior to joining the company, he graduated from the University of Dayton with a degree in Finance. Craig completed his education through the College for Financial Planning and earned his CERTIFIED FINANCIAL PLANNER™ designation in 2015. In addition, he is an active member of NAPFA and a regular contributor to the radio show "Managing to be Wealthy with John Sestina" on 610 WTVN. "Financial planning is an important piece of every individual's life but is often overlooked," said Craig. "I've seen the benefits of a financial plan firsthand, easing the decisions being made when families face hardships."

Doug Johnson

Doug is a licensed independent Health and Life insurance agent, who help individuals, families, Medicare members, and small employers navigate a complex, highly regulated, and rapidly changing insurance marketplace. Drawing from broad experience with the ACA, ERISA, CMS/Medicare regulations, and over 150 different insurance carriers in multiple markets, Doug creates solutions based on individual client needs. He has been a licensed agent since 2002, and prior to opening his own agency in 2014, practiced as a private insurance consultant (Clarity Consulting), helped build a national health data analytics firm (WellNet Healthcare), and developed a national sales organization (Progressive Insurance).

Scott Mote

B.A. cum laude, Wright State University 1972; M.A., University of Dayton 1973; J.D., Capital University Law School 1977. Admitted to practice: Ohio, 1977; U.S. District Court, S.D. Ohio, 1977; Florida, 1978; U.S. District Court, N.D. Ohio, 1978; United States Supreme Court, 1987. Professional Memberships: Ohio State Bar Association (Council of Delegates, District 7; Estate Planning, Trust & Probate Law Section; Lawyers Assistance Committee); Columbus Bar Association (Admissions (Chair 1994-96), Probate Committees); The Florida Bar (Out-of-State Practitioners Division); Ohio State Bar Foundation; Columbus Bar Foundation; Central Ohio Association for Justice, Franklin County Trial Lawyers Assn; Central Ohio Association of Criminal Defense Lawyers; American Bar Association (Commissioner, Commission on Lawyer Assistance Programs (2010-2013); Section of Legal Education and Admission to the Bar, health Law Section. Recognition/awards: Columbus Bar Association's 2005 Award of merit for service to the profession; Ohio State Bar Association's 2006 Ohio Bar Medal, its highest award for service to the profession; Ohio State Bar Association's 2010 Eugene R. Weir Award for Ethics and Professionalism; Capital University Law School's 2013 Alumni of the year Award. Hobbies/Avocations: Golf, hunting, fishing, trap, skeet & sporting clays shooting, reading & observing the arts. Mr. Mote is Executive Director of the Ohio Lawyers Assistance Program, Inc. (OLAP).

Ann Anzalone

Ann Anzalone is a nationally known, dynamic speaker and experienced trainer. For the past 30 years she has conducted workshops for K-12 teachers, administrators and parents, as well as for businesses and corporations. She teaches graduate classes at Wright State University and has taught at Antioch Midwest University. She serves as a consultant for adult students, parents and their children regarding learning styles, educational plans and academic performance. In addition, she has provided foster parent training for several Children's Services Agencies in Ohio. Ann taught special needs middle and junior high school students, was honored as an Outstanding Elementary Teacher of America and listed in the Who's Who in American Education. Ann is a teacher's teacher, specializing in communication skills, community building, learning styles, cooperative learning, study skills and stress management. She is an energetic and enthusiastic presenter. Her presentations are very practical and focus on the development of techniques, strategies and tools to optimize learning and communication skills. She models what she teaches in her sessions. Ann is a teacher's teacher, specializing in communication skills, community building, learning styles, cooperative learning, study skills and stress management. She is an energetic and enthusiastic presenter. Her presentations are very practical and focus on the development of techniques, strategies and tools to optimize learning and communication skills.

Ted Gudorf

Ted Gudorf, J.D., LL.M. is the founder and managing attorney of Gudorf Law Group, LLC, which was established in 1992. With over 30 years of legal experience, he concentrates his practice in the areas of estate planning, probate, elder law, and related matters. Throughout his career, Ted has demonstrated a commitment to professional development so that he can offer his clients the most knowledgeable guidance. He was the first attorney in the state of Ohio to obtain a Master of Laws (LL.M.) degree in estate planning and elder law. He was also one of the first attorneys to be board certified by the Ohio State Bar Association in estate planning, trust, and probate law. Fewer than two hundred attorneys in Ohio have achieved this status. Ted's accomplishments have been recognized by the legal community. In 2012, Ted received a Martindale Hubbell® AV Preeminent rating. Only the top 5% of attorneys nationwide receive this honor, which is based on ratings from other attorneys who have knowledge of a recipient's abilities, experience, and ethics. He has also been selected for inclusion in Ohio Super Lawyers since 2010. Colleagues describe Ted as "an exceptionally skilled lawyer" with "superior analytical, communication, and advocacy skills." Because of his experience and reputation, Ted is a sought-after speaker on estate planning and related topics. He has made hundreds of presentations throughout Ohio and the United States, and has co-authored two publications and numerous articles on estate planning and asset protection. When not practicing law, Ted is active in the Dayton community, where he has been a longtime resident. He serves as President of the Board of Directors of Life Essentials, Inc., a nonprofit agency focused on providing guardianships for mentally ill adults with limited financial resources. He is also a founding trustee of the Greater Dayton Volunteer Lawyers Project and previously served as the first mayor of the city of Clayton, Ohio.

James Tesno

Jim is a partner in the firm of Meikle, Tesno & Luth in Celina. He received his law degree from the Ohio Northern University and has been practicing for over 45 years! Jim's area of practice include Business/Corporations, LLC; Estates/Wills/Probate; Real Estate and Criminal/OVI.

Carol Holm

Carol has practiced law in the Dayton area since 1982. She held an appointment as Prosecutor for Montgomery County for 10 years. She has been Special Counsel for the Ohio Attorney General. Her private practice is focused on the area of Family and Juvenile Law, Education Law, Criminal Law, Probate and Bankruptcy. Carol taught Business and Administrative Law classes as an adjunct instructor for Capital University for 20 years. She has taught several classes at OSHER Institute at the University of Dayton - all in the areas of law. She wrote "Parent and Student Rights" for the Dayton Bar Association, has written for Dayton Bar Briefs and has done seminars for attorneys. She authored "Know Your Schools" for the League of Women Voters. She held teachers licenses in Iowa, California and Ohio. Carol earned her B.A. degree from the University of Iowa, did graduate work at California State University at Los Angeles, and received her J.D. degree from the University of Dayton.

Chuck Strain

Chuck is a solo practice lawyer based in downtown Cincinnati. Since Ohio bar admission in 1981, he has focused on Ohio DUI law, exclusively since 1996. Although he has traveled to distant Ohio counties to represent DUI defendants, the bulk of his practice lies in Butler, Warren, Clermont and Hamilton counties. Chuck is a frequent speaker at DUI seminars and has appeared on radio talk shows and television news programs discussing DUI law. He has completed the National Highway Transportation Safety Administration approved course in standardized field sobriety testing and is certified to maintain and repair Intoxilyzer 5000 breath testing machines. Chuck is a member of the National College for DUI Defense.

Joseph Humpolick

Joe is a retired public defender from Ashtabula County. He served 38 years in that capacity before retiring last year. Joe has been a member of the OACDL since its inception over 30 years ago, and still serves as the organization's treasurer.