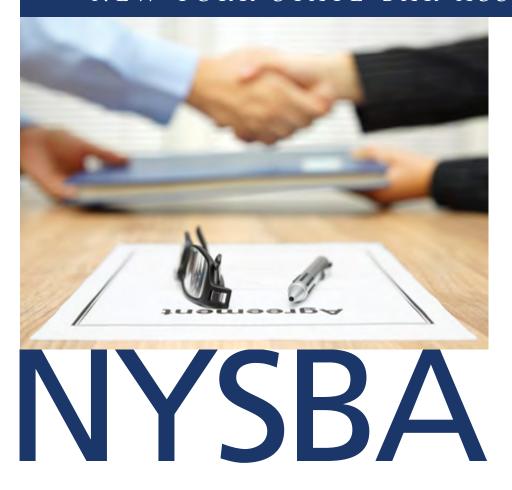
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Mediation's Advantages in Resolving Wills, Trusts, Estates and Adult Guardianship Matters

Tuesday, June 6, 2017

9:00 A.M. – 1:15 P.M. New York Law School | 185 West Broadway New York, NY 10013



NEW YORK STATE BAR ASSOCIATION

Mediation's Advantages in Resolving Wills, Trusts, Estates and Adult Guardianship Matters

Mediation of disputes involving trusts, estates, probating Wills, and adult guardianship matters is becoming increasingly popular due to the varied benefits that dispute resolution processes provide. In other parts of the country mediation is the more usual process utilized for these disputes.

The movement towards mediation is a reflection of its unique utility and benefit in this context. Disputes in these areas generally involve emotionally charged interpersonal relations; the disputing parties quite frequently are siblings, close relatives, and other family members. Mediation can be more suited than litigation in resolving these interpersonal matters, which provide a more intimate setting and allows for creative solutions. For these reasons, mediation is a valuable tool that should be considered whenever possible. It can be of great benefit in dealing with issues relating to cultural diversity. A distinguished panel of recognized mediators, litigators, trusts, estates and elder law practitioners, and judge will reveal mediation's benefits and advantages and demonstrate why mediation's time has come upon us for those practicing in these areas.

This program will be of particular interest to trusts and estates attorneys and elder law attorneys who litigate in the Surrogate's Court and Supreme Courts dealing with wills, trusts, estates, guardianship disputes, the elderly, and those who are confronted with these disputes in their planning practice. Attorneys may be seeking better utilization of their time and efforts – and that of their clients as well. Those attending will gain an understanding of the advantages mediation offers over litigation, including time and cost efficiencies, active and meaningful client participation, and the potential for tailored resolutions, which leads to improved client satisfaction.

Panelists and Speakers:

Surrogate Brandon Sall, Surrogate, Westchester County Surrogate's Court

Leona Beane, Esq., Arbitrator and Mediator, and Trusts and Estates and Guardianship Attorney

Gary B. Freidman, Esq., Partner, Greenfield Stein & Senior, LLP, Former Chair, NYSBA Trusts and Estates Section

Professor Lela Porter Love, Director, Kukin Program for Conflict Resolution Director, Cardozo Mediation Clinic, Benjamin N. Cardozo School of Law

Eric W. Penzer, Esq. Trusts and Estates Litigator, Partner, Farrell Fritz P.C.

Robert D. Steele, Esq., Trusts and Estates Attorney & Mediator, Partner, Schwartz Sladkus Reich Greenberg Atlas LLP

Daniel Weitz, Esq., State-Wide Coordinator of Alternative Dispute Resolution, New York State Court System

Pauline Yeung-Ha, Esq., Partner, Grimaldi & Yeung, LLP, Elder Law Attorney

Assistance in programing: Marc Sheridan, Esq. and Michael Walsh, Esq. On behalf of the Westchester County Bar Association's ADR Committee.

AGENDA

8:40 A.M. – 9:00 A.M. Registration and Continental Breakfast

9:00 A.M. – 9:10 A.M. Introduction

Speaker: Robert D. Steele

9:10 AM. – 9:40 A.M. How Mediation Differs from Adversarial Proceedings —

Benefits of Mediation - The Mediation Process

Speaker: Professor Lela Love

9:40 A.M. – 10:10 A.M. Challenges of Mediating High Conflict Family Disputes —

Cognitive and Emotional Barriers to Resolution

Speaker: Daniel Weitz

10:10 A.M. – 10:40 AM. Different Mediation Programs and Models for Use in Surrogate's

Court and Supreme Court Litigation

Moderator: Leona Beane

Speakers: Surrogate Brandon Sall

Daniel Weitz

10:40 A. M. – 11:10 A.M. Role Play 1: Sibling Estate Dispute After Death of Mother

Mediator: Professor Lela Love **Speakers:** Leona Beane

Gary B. Freidman Eric Penzer Robert D. Steele

11:10 A.M. – 11:25 A.M. Coffee Break

11:25 A.M. – 11:55 A.M. What Types of Disputes are More Amenable to Mediation —

A Discussion Among Trusts, Estates and Guardianship Attorneys

and the Court

Moderator: Robert D. Steele **Speakers:** Gary B. Freidman

Eric Penzer

Surrogate Brandon Sall Pauline Yeung-Ha

11:55 A.M. – 12:30 P.M. Role Play 2: Possible Guardianship Proceeding

Mediator and Speaker: Daniel Weitz

Speakers: Leona Beane

Robert D. Steele Pauline Yeung-Ha

12:30 P.M. – 1:00 P.M. Round Table: Summations from the Speakers and Feedback

on Roleplays

Moderator: Leona Beane **Speakers:** Gary B. Freidman

Professor Lela P. Love

Eric Penzer

Surrogate Brandon Sall

Robert D. Steele Daniel Weitz Pauline Yeung-Ha

1:00 P.M. – 1:15 P.M. Questions from Audience

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Dispute Resolution **Section**

Mediation's Advantages in Resolving Wills, Trusts, Estates and Adult Guardianship Matters

Tuesday, June 6, 2017 New York Law School 185 West Broadway New York, NY 10013

www.nysba.org/mediationCLEjune6

Fax or mail this form with registration fee(s) to:

Sydney Joy, Section Liaison

New York State Bar Association

One Elk Street

Albany, New York 12207 Phone: 518.487.5630 Fax: 518.463.5993 Email: sjoy@nysba.org

Please refrain from faxing and mailing as

this can result in double billing.

Registration fee includes:

Continental breakfast, snack, CLE program, and programming materials

Cancellation Notice:

Notice of cancellation must be received by May 30, 2017 in order to obtain a refund of registration fees. Please contact Sydney Joy at sjoy@nysba.org or 518-487-5630 to cancel your registration DRSFA2016 – BG

