Ethics Credit

The following sessions may be approved for ethics credit. Ethics credit for these sessions may not be available in all instances. Please refer to the ethics accreditation information for your specific jurisdiction and profession.

Wednesday, January 24, 2018  Special Session II-C (2:00 – 3:30 p.m.)
Technology and Estate Planning: The Rise of the Machines
Bruce M. Stone, Eliam Medina, Suzanne Brown Walsh
First it was word processing and desktop calculators. Then document assembly systems, spreadsheets, and actuarial software. Mail delivery was replaced by faxing which was replaced by email which is being replaced by cloud storage and shared access. The internet provides access to vast troves of knowledge. Wills prepared online, executed with remote witnesses and existing only as electronic records are here. The only thing not yet replaced is the human brain of the estate planner. Will artificial intelligence replace us eventually? Do we have professional and ethical duties to embrace the fullest use of advances in technology?

Thursday, January 25, 2018  Special Session III-E (2:00 – 3:30 p.m.)
Ethical Issues in Advising Clients on Planning for, Creating, Operating, Transferring Control and Ownership of, and the Dissolution of Closely-Held Businesses
Charles D. “Skip” Fox, IV, J. Lee E. Osborne, Mary F. Radford
Through the use of case studies this session will examine many of the ethical issues involved in all aspects of the life cycle of a closely-held business from inception to end. Some of the areas to be examined are competence, timeliness of work, keeping the clients informed, and, of course, the conflicts that can arise in representing more than one party involved in the business.

Thursday, January 25, 2018  Special Session IV-E (3:50 – 5:20 p.m.)
Ethics and Negotiations
Steven K. Mignogna, Jo Ann Engelhardt, Terrence M. Franklin, Richard W. Nenno, Robert D. Steele, Matthew H. Triggs
Ethical challenges arise in any negotiation, especially when intertwined with thorny trust and estate issues. The panel will address the ethical and strategic implications in negotiating with counsel, clients, and advisors. This program will include a mock mediation in which the participants grapple with common yet intriguing – and even entertaining – problems.

Technology Credit
(Florida Attorneys only)

The following session has been approved by the Florida Bar for 2.0 technology credits.

Wednesday, January 24, 2018  Special Session II-C (2:00 – 3:30 p.m.)
Technology and Estate Planning: The Rise of the Machines
Bruce M. Stone, Eliam Medina, Suzanne Brown Walsh
First it was word processing and desktop calculators. Then document assembly systems, spreadsheets, and actuarial software. Mail delivery was replaced by faxing which was replaced by email which is being replaced by cloud storage and shared access. The internet provides access to vast troves of knowledge. Wills prepared online, executed with remote witnesses and existing only as electronic records are here. The only thing not yet replaced is the human brain of the estate planner. Will artificial intelligence replace us eventually? Do we have professional and ethical duties to embrace the fullest use of advances in technology?