Planning for the Future: Preparing Simple Wills, Powers of Attorney, and Advance Directives

Friday, April 1, 2016
1:00-4:15 PM
300 East Broad Street, Columbus, Ohio 43215

PROGRAM DESCRIPTION
This program is designed to assist volunteer attorneys and paralegals who are participating in the PACO/LASC Pro Bono Wills Clinics which are held twice monthly at different sites throughout Central Ohio. At these clinics, attorneys talk with the clients after the paralegals prepare the documents. Clients are provided with completed simple wills, health care powers of attorney, living wills, organ donor registry, declaration of funeral arrangements, and financial powers of attorney.

AGENDA
1:00-1:15 — Introduction to the Wills Clinic Procedures
   Marcia Palof
1:15-2:15 — Preparing a Simple Will
   Jamie Fillippi
2:15-2:45 — Preparing a Power of Attorney
   Jamie Fillippi
2:45-3:00 — Break
3:00-3:30 — Health Care Power of Attorney, Living Will
   Marcia Palof
3:30-4:15 — Clinic Procedures and Document Formatting
   Jamie Fillippi, Teresa Scharf, Marcia Palof

3 CLE Credits have been approved by the Supreme Court of Ohio
# Planning for the Future: Preparing a Simple Will, POA, and Advance Directives

## Faculty

**Jamie Fillippi** currently works as an Assistant Trust Officer at Park National Bank in Columbus, Ohio. Prior to joining Park, Jamie was an attorney in private practice where she focused on estate planning and administration, tax matters, corporate and commercial transactions, elder law and long term care planning. She is licensed to practice law in Ohio and West Virginia. Since moving to Columbus, Jamie has been an active volunteer with the PACO/LASC Pro Bono Wills Clinic program, Dress for Success Columbus, and she serves as a Volunteer Legal Guardian through the Central Ohio Area Agency on Aging. Jamie graduated from the Duquesne University School of Law in 2012. She obtained her B.S. in journalism from the E.W. Scripps School of Journalism at Ohio University, *magna cum laude*, in 2009.

**Teresa Scharf** serves as the Chair of the Pro Bono Committee for the Paralegal Association of Central Ohio (PACO) and is the Director of the Wills Clinics for which the CLE is designed. She has twelve years of experience as a litigation paralegal and twenty five years overall in the legal services profession. She obtained her degree in Paralegal Studies, *cum laude*, from Columbus State in 2007. Teresa is an OSBA Certified Paralegal and is a member of the OSBA Paralegal Certification Board. She has received a number of awards, including the 2014 Outstanding Pro Bono Support Award from the Legal Aid Society of Columbus. Teresa is involved in other pro bono activities in addition to the Wills Clinics. She is a paralegal in the Business Litigation Practice and Products Liability / Mass Torts Defense groups at Ulmer & Berne LLP.

**Marcia Palof** is the managing attorney of Intake at LASC. She received her J.D. from the Moritz College of Law at The Ohio State University in 1980. She serves on the Steering Committee of the National Coalition for a Civil Right to Counsel. Marcia has been a strong supporter and participant of the Wills Clinic effort since its inception in 2010, and has served as the supervising attorney at every Wills Clinic event.

## Registration

This training is free to any attorney or paralegal currently participating in a Pro Bono program through LASC, or SEOLS. All others will be charged a fee of $110.


Unless a hard copy is specifically requested, materials will be e-mailed to participants in advance of the training. Thank you for helping us save resources!