

Hot Topics in Probate

Tuesday, November 14
Aqua Turf Club, Plantsville

Presented by the Connecticut Probate
Assembly and the CBA Estates and
Probate and Elder Law Sections



Agenda

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| 8:30 a.m. – 9:00 a.m. | Registration, coffee, tea and bottled waters |
| 9:00 a.m. – 9:15 a.m. | Welcome Remarks <ul style="list-style-type: none">❖ <i>Hon. Beverly Streit-Kefalas</i> – Probate Court Administrator, Office of the Probate Court Administrator❖ <i>Maggie Castinado</i>, CBA President❖ <i>Hon. Michael M. Darby</i> – Vice President, CT Probate Assembly |
| 9:15 a.m. – 10:15 a.m. | Medicine Meets the Law—Diagnosis, Competency and Influence make the Playing Field (60 min) (EEP231114-1) <ul style="list-style-type: none">❖ <i>Dr. Harry Morgan</i> – The Center for Geriatric and Family Psychiatry, Inc. |
| 10:15 a.m. – 10:30 a.m. | Break |
| 10:30 a.m. – 11:15 a.m. | Accountings (45 min) (EEP231114-2) <ul style="list-style-type: none">❖ <i>Hon. Michael Darby</i> – Judge of Probate, Greater Manchester Probate District❖ <i>Attorney Danielle Ferrucci</i> – Partner, Shipman & Goodwin LLP |
| 11:15 a.m. – 12:00 p.m. | Elder Abuse/Exploitation Part 1: Recognizing the signs and Developing the Case (45 min) (EEP231114-3A) <ul style="list-style-type: none">❖ <i>Attorney Paul Knierim</i> – Partner, Czepiga Daly Pope & Perri LLC, formerly of the Simsbury Probate District, and past Probate Court Administrator❖ <i>Attorney Carmine Perri</i> – Principal, Czepiga Daly Pope & Perri LLC |

12:00 p.m. – 1:00 p.m. Lunch

1:00 p.m. – 1:45 p.m.

**Elder Abuse/Exploitation Part 2: Remedies and Prevention
(45 min) (EEP231114-3B)**

- ❖ *Hon. Domenick Calabrese* – Probate Judge, Region # 22
Probate Court
- ❖ *Attorney Andrew Veale* – Counsel, Czepiga Daly Pope & Perri
LLC

1:45 p.m. – 2:00 p.m. Break

2:00 p.m. – 2:45 p.m.

**Trust Modification, Jurisdiction, and Practice (45 min)
(EEP231114-4)**

- ❖ *Hon. William Osterndorf* – Judge of Probate, Darien-New
Canaan Probate District
- ❖ *Attorney Kelley Galcia Peck* – Principal, Cummings &
Lockwood LLC

2:45 p.m. – 3:30 p.m.

Fiduciary and Attorney Fees (45 min) (EEP231114-5)

- ❖ *Hon. Michael Brandt* – Judge of Probate, East Haven-North
Haven Probate District
- ❖ *Attorney Douglas Brown* – Principal, Brody Wilkinson PC
- ❖ *Attorney David R. Hermenze* – Principal, Brody Wilkinson PC

3:30 p.m.

Conclusion of educational program