

Trusts and Trust Proceedings for Clerks of Superior Court

January 11, 2023

School of Government, Chapel Hill, NC

8:30 am	Check-in opens
9:15 am	Welcome Meredith Smith, UNC School of Government
9:30 am	Trust Fundamentals [60 min] Janice Davies, Partner, Davies Law PLLC
10:30 am	Break
10:45 am	Trust Proceedings [60 min] Meredith Smith, Associate Professor, UNC School of Government
11:45 am	Lunch
12:30 pm	Testamentary Trusts, Pour-Over Wills, and the Clerk [60 min] Lisa Smith, Procedural Help Desk Specialist, NC Administrative Office of the Courts
1:30pm	Break
1:45pm	The Intersection of Trusts, Single Transactions and Guardianship [60 min] Catherine Wilson, Attorney, McPherson, Rocamora, Nicholson, Wilson & Hinkle, PLLC Meredith Smith, UNC School of Government
2:45pm	Break
3:00pm	Special Needs Trusts and the Clerk [60 min] Catherine Wilson, Attorney, McPherson, Rocamora, Nicholson, Wilson & Hinkle, PLLC
4:00 pm	Adjourn

CLE: 5.00

Any lunch provided as part of this program is paid for by the NC Judicial College or the Administrative Office of the Courts. When claiming reimbursement for expenses for this program, the portion of the daily travel allowance allocated for lunches provided by the program may not be claimed.

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