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
2:45pm    Break
3:00 pm   Special Needs Trusts and the Clerk [60 min]
          Catherine Wilson
4:00 pm   Adjourn

CLE: 5.00 (pending Bar approval)

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.

Admission to all School of Government schools and conferences is without regard to race, color, religion, sex, national origin, age, disability status, veteran status, or sexual orientation. If you need accommodation to participate in any Institute program, please let us know. We will be glad to assist you.