

# Trusts and Trust Proceedings for Clerks of Superior Court

December 4, 2019

School of Government, Chapel Hill, NC

<b>8:30 am</b>	<b>Check-in</b>
<b>9:00 am</b>	<b>Welcome</b> Meredith Smith, UNC School of Government
<b>9:15 am</b>	<b>Trust Fundamentals [75 min]</b> Janice Davies, Partner, Davies Law PLLC
<b>10:30 am</b>	<b>Break</b>
<b>10:45 am</b>	<b>Trust Proceedings [60 min]</b> Meredith Smith, Associate Professor, UNC School of Government
<b>11:45 am</b>	<b>Lunch</b>
<b>12:30 pm</b>	<b>Testamentary Trusts, Pour-Over Wills, and the Clerk [60 min]</b> Lisa Smith, Procedural Help Desk Specialist, NC Administrative Office of the Courts
<b>1:30pm</b>	<b>Break</b>
<b>1:45pm</b>	<b>Special Needs Trusts and the Clerk [75 min]</b> Bryan Thompson, Partner, Surratt Thompson & Ceberio, PLLC
<b>3:00pm</b>	<b>Break</b>
<b>3:15pm</b>	<b>The Intersection of Trusts and Guardianship [45 min]</b> Bryan Thompson, Partner, Surratt Thompson & Ceberio, PLLC
<b>4:00pm</b>	<b>Special Needs Trust Review [30 min]</b> Taylor Roberts and Richard Gambrell, HMS NC Trust Unit, North Carolina Department of Health & Human Services, Division of Medical Assistance
<b>4:30pm</b>	<b>Adjourn</b>

**CLE:**

**\*pending 5.75 hours of NC Bar CLE credit**

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