Pennsylvania Bar Association
Real Property, Probate & Trust Law Section
Annual Meeting

May 8-9, 2013
Wyndham Grand Pittsburgh Downtown
Pittsburgh, Pa.
WEDNESDAY, MAY 8, 2013

9:00 a.m. – 9:45 a.m.
“Recent Developments in Real Property” CLE 301
This perennially favorite presentation of the most recent court-decisions, hottest topics and “must-know” happenings in the field of real property law is eagerly anticipated each year.

Speakers:
Andrea Geraghty, Esq., Meyer, Unkovic & Scott, LLP, Pittsburgh
Marshal Granor, Esq., Granor & Granor PC, Horsham
Vincent B. Mancini, Esq., Law Offices of Vincent B. Mancini & Associates, Media
Brett M. Woodburn, Esq., Caldwell & Kearns PC, Harrisburg

*CLE Credit: 0.5 Substantive Hour

10:00 a.m. – 10:45 a.m.
“Recent Developments in Probate” CLE 302
Each year, attendees are fascinated by Kirby Upright’s discussion of key probate issues that affect practitioners and their clients. Don’t miss this important session!

Speaker:
Kirby G. Upright, Esq., King, Spry, Herman, Freund & Faul LLC, Bethlehem

*CLE Credit: 0.5 Substantive Hour

If you attend both “Recent Development” sessions, you will receive 1.5 hours of substantive CLE credits. If only one session is attended, you will receive .5 hour of credit per session.

10:45 a.m. – 11:45 a.m.
“Inheritance Tax Exemption for Family Farms” CLE 303
Act 85 of 2012 included some significant tax exemptions for farm assets. This session will go beyond the basics in evaluating the expanded family farm business exemption to the realty transfer tax and the two tiers of the new agricultural exemptions to the inheritance tax. Learn what is exempt, what is not and where the uncertainties and traps are from a practical perspective. Identify pre-death and other planning actions that can be used to expand the reach of these exemptions.

Speaker:
Gary J. Heim, Esq., Persun & Heim PC, Mechanicsburg

*CLE Credit: 1.0 Substantive Hour

2:00 p.m. – 3:00 p.m.
“Understanding Court-Ordered Reassessments: The Allegheny County Example” CLE 304
When a countywide reassessment is initiated by court order, there remains a bevy of considerations and clarifications to work out before a tax roll can be certified. Allegheny County is near the end of such a time- and labor-intensive process. To best understand how the county, solicitors, private attorneys, appraisers and taxpayers got to this point (and lessons for other counties across the commonwealth), we must examine that process with a distinguished panel of the former county solicitor, co-lead counsel for the plaintiffs to the underlying lawsuit and two private attorneys who represented interests both in the drafting of the process and the appellant taxpayers at the various tax appeal levels.

Speakers:
Robert M. Junker, Esq., Law Offices of Ira Weiss, Pittsburgh
Peter H. Schnore, Esq., Reed Smith LLP, Pittsburgh
Michael H. Wojcik, Esq., Thorp Reed & Armstrong, LLP, Pittsburgh

Moderator:
Hal D. Coffey, Esq., Sitko Bruno LLC, Pittsburgh

CLE Credit: 1.0 Substantive Hour

3:00 p.m. – 3:15 p.m.
Networking Break

3:15 p.m. – 4:15 p.m.
“Deed Drafting Mistakes and How to Avoid Them” CLE 305
In this one-hour lecture, we will discuss the requisite components of the different types of deeds, from general warranty to quitclaim, with special emphasis on the requisite elements of a standard fee simple deed. The different types of estates in land created by deed will be detailed, and we will discuss the mistakes commonly made in deed preparation, as well as the actions necessary to prevent their occurrence.

Speakers:
Erin M. Fagnilli, Esq., Chicago Title Insurance Co., Pittsburgh
Frank Kosir Jr., Esq., Meyer Unkovic & Scott LLP, Pittsburgh

CLE Credit: 1.0 Substantive Hour
3:15 p.m. – 4:15 p.m.
“Update on Orphans’ Court Rules and Appeals from the Orphans’ Court Division” CLE 306
Most Orphans’ Court litigation cases arise under an account or a petition under OC rules. To appeal after hearing, a mix of local rules and new (2012) Appellate Rules apply. This session explores case and rule developments regarding appeals from the OC, including appellate mediation.

Speakers:
Neil Hendershot, Esq., Serratelli Schiffman & Brown PC, Harrisburg
CLE Credit: 1.0 Substantive Hour

4:15 p.m. – 5:15 p.m.
“Pittsburgh Strip District Development” CLE 307
The Strip District, one of the City of Pittsburgh’s landmark neighborhoods, has evolved from an area of primarily warehouse and other industrial uses, to one of the most attractive areas in the city for residential redevelopers. In an interactive setting, we will discuss the evolution of the Strip District, its role in the Allegheny Riverfront Vision Plan, as well as current challenges and opportunities for future redevelopment.

Speakers:
Louis M. Kodumal, Esq., Law Offices of Vincent B. Mancini & Associates, Media
Paul Svoboda, Urban Redevelopment Authority, Pittsburgh
CLE Credit: 1.0 Substantive Hour

5:00 p.m. – 7:30 p.m.
Law School Alumni Receptions

7:30 p.m. – 10:00 p.m.
RPPT Wine-Pairing Dinner
The Real Property, Probate and Trust Law Section will hold its annual Wine-pairing Dinner at Cioppino’s Restaurant. Attendees will have the opportunity to taste a selection of exquisite wines, paired with outstanding food and exceptional service. A percentage of the cost of this dinner is subsidized for members by the RPPT Section. Round-trip transportation will be provided.

Cost: $80 RPPT Section Members
$110 Non-Section Members

RPPT REGISTRATION FEE:
$370 Section members
$490 PBA non-Section members
$490 non-PBA member
$170 non-attorney fee

Includes registration, RPPT CLE Sessions, Wednesday’s PBA Awards Luncheon and Thursday’s RPPT Law Section Breakfast Meeting. You are also invited to attend the Commission on Women in the Profession Luncheon on Thursday for an additional cost.

THURSDAY, MAY 9, 2013

8:00 a.m. – 9:00 a.m.
RPPT Law Section Breakfast Meeting

9:00 a.m. – 10:00 a.m.
“Update on Federal Estate and Gift Taxes: Where Did We Land When We Fell off the (Fiscal) Cliff?” CLE 308
In a last-minute deal to avert the total repeal of the 2001 federal tax cuts, Congress adopted a sweeping compromise on income, estate and gift taxes. This seminar will discuss which tax laws changed, which ones remained the same and which income tax provisions are especially relevant to our practices.

Speakers:
Aubrey H. Glover, Esq., Cohen & Grigsby, PC, Pittsburgh
Jennifer L. Rawson, Esq., Eckert Seamans Cherin & Mellott, LLC, Pittsburgh
Bridget M. Whitley, Esq., SkarlatosZonarich LLC, Harrisburg
CLE Credit: 1.0 Substantive Hour

10:00 a.m. – 10:15 a.m.
Break

10:15 a.m. – 11:15 a.m.
“TIF: A Catalyst for Economic Development” CLE 309
Tax Increment Financing (TIF) is an economic development tool used to finance public infrastructure improvements when the economics of a project cannot justify the cost of this investment. Properly utilized, TIF can make the difference of a project being successfully funded or not. This course will look at the basics of TIF and how it has been used throughout Allegheny County as a catalyst for economic development.

Speakers:
Dusty E. Kirk, Esq., Reed Smith LLP, Pittsburgh
Maurice Strul, Allegheny County Economic Development, Pittsburgh
CLE Credit: 1.0 Substantive Hour

10:15 a.m. – 11:15 a.m.
“ Representing Lawyers in Trust and Estate Malpractice Cases” CLE 310
Lawyers who plan and administer estates frequently are the target of malpractice claims. Recent national statistics place the estate and trust category in the top five areas generating malpractice claims. A look at the characteristics of these claims and the issues raised is “time well spent” when considering how to avoid a malpractice claim.

Speaker:
James R. Schadel, Esq., Weinheimer Schadel & Haber PC, Pittsburgh
CLE Credit: 1.0 Ethics Hour
PBA Real Property, Probate & Trust Law Section Annual Meeting
Registration Form
Registration Deadline: April 26

Name (Please type or print)

Nickname for Badge
Supreme Court ID Number

Phone # ____________________________  E-mail ______________________________ Fax # ____________________________

Address __________________________________________________________________________________________________

Name of Spouse/Guest ___________________________   Spouse/Guest Name to appear on Badge ____________________________

☐ Check here if you require special services. Attach a written description of needs.

- Attorneys in practice for one year or less do not need to pay the registration fee, but must pay CLE fees and meal costs.
- No fee for non-attorney spouses, except meal function costs.
- The registration fees apply to those participating in Wednesday’s and Thursday’s events; there is no registration fee to participate in a committee or section meeting or in the House of Delegates Meeting.
- All PBA members are invited to attend the House of Delegates Meeting.

REGISTRATION OPTION 1: ANNUAL MEETING REGISTRATION
Registration does NOT include the fee for meals or CLE Courses. YOU MUST REGISTER FOR AND PAY THE ASSOCIATED FEES TO ATTEND THE INDIVIDUAL CLE COURSES LISTED ON PAGE 5.

☐ PBA Member $125 ☐ Non- PBA Member Attorneys $290 ☐ Attorney in Practice one year or less $0 AMOUNT DUE $_________

REGISTRATION OPTION 2: REAL PROPERTY, PROBATE AND TRUST LAW SECTION ANNUAL MEETING: (for those attending all RPPT Annual Meeting events only). Includes registration, RPPT CLE Sessions, Wednesday’s Awards Luncheon and Section Breakfast Meeting on Thursday. It does NOT include Wednesday night dinner or the WIP Luncheon on Thursday. Additional meal tickets may be purchased in MEAL FUNCTIONS section below.

☐ RPPT Section Member $370 ☐ PBA Member, Non-Section Member $490 ☐ Non-PBA Member Attorney $490 ☐ Non-Attorney $170 AMOUNT DUE $_________

CLE FEES: Complete the CLE Registration Form on page 5. Enter the total cost of CLE hours onto the line below.

TOTAL CLE FEES DUE $_________

MEAL FUNCTIONS: IF YOU REGISTERED FOR OPTION 2, THE REAL PROPERTY, PROBATE AND TRUST LAW SECTION ANNUAL MEETING, SOME MEAL FUNCTIONS ARE INCLUDED IN THE REGISTRATION FEE. ONLY COMPLETE THE SECTION BELOW FOR ANY ADDITIONAL MEAL TICKETS REQUIRED. (Please indicate the number of tickets required)

Wednesday
☐ PBA Awards Luncheon $35
☐ Real Property, Probate and Trust Law Section Dinner
☐ Section Member $80 ☐ Non-Section Member $110

AMOUNT DUE $_________

Thursday
☐ Women in the Profession Luncheon $35
☐ Annual Reception/Dinner $125 ☐ YLD Members/YLD Spouse or Guest $90

AMOUNT DUE $_________

Friday
☐ House of Delegates Luncheon $0

TOTAL DUE $_________

(Copy this figure where indicated on page 5.)
**CLE REGISTRATION FOR WEDNESDAY, MAY 8**

- **RPPT Recent Developments in Real Property (301)**  
  9:00 a.m. – 9:45 a.m.  
  0.5 Substantive CLE Hour  
  Cost $17

- **RPPT Recent Developments in Probate (302)**  
  10:00 a.m. – 10:45 a.m.  
  0.5 Substantive CLE Hour  
  Cost $17

- **RPPT Inheritance Tax Exemption for Family Farms (303)**  
  10:45 a.m. – 11:45 a.m.  
  1.0 Substantive CLE Hour  
  Cost $25

- **RPPT Understanding Court-Ordered Reassessments: The Allegheny County Example (304)**  
  2:00 p.m. – 3:00 p.m.  
  1.0 Substantive CLE Hour  
  Cost $25

- **Navigating the Legal and Media Issues Involved in Litigating a High-Profile Case (314)**  
  2:00 p.m. – 4:00 p.m.  
  1.0 Substantive/1.0 Ethics CLE Hours  
  Cost $50

- **RPPT Deed Drafting Mistakes and How to Avoid Them (305)**  
  3:15 p.m. – 4:15 p.m.  
  1.0 Substantive CLE Hour  
  Cost $25

- **RPPT Update on Orphans’ Court Rules and Appeals from the Orphans’ Court Division (306)**  
  3:15 p.m. – 4:15 p.m.  
  1.0 Substantive CLE Hour  
  Cost $25

- **Simple Things You Can Do to Improve Your Life in Your Practice (315)**  
  4:15 p.m. – 5:15 p.m.  
  1.0 Ethics CLE Hour  
  Cost $25

- **RPPT Pittsburgh Strip District Development (307)**  
  4:15 p.m. – 5:15 p.m.  
  1.0 Substantive CLE Hour  
  Cost $25

**CLE REGISTRATION FOR THURSDAY, MAY 9**

- **RPPT Update on Federal Estate and Gift Taxes: Where Did We Land When We Fell Off the (Fiscal) Cliff? (308)**  
  9:00 a.m. – 10:00 a.m.  
  1.0 Substantive CLE Hour  
  Cost $25

  9:30 a.m. – 10:30 a.m.  
  1.0 Substantive CLE Hour  
  Cost $25

- **RPPT TIF: A Catalyst for Economic Development (309)**  
  10:15 a.m. – 11:15 a.m.  
  1.0 Substantive CLE Hour  
  Cost $25

- **RPPT Representing Lawyers in Trust and Estate Malpractice Cases (310)**  
  10:15 a.m. – 11:15 a.m.  
  1.0 Ethics CLE Hour  
  Cost $25

- **WIP Real Life Challenges, Real Life Solutions: How Mentoring, Education & Leadership Development Training Can Level the Playing Field (311)**  
  10:30 a.m. – 11:30 a.m.  
  1.0 Substantive CLE Hour  
  Cost $25

- **Right to Know: What You Need to Know (317)**  
  10:45 a.m. – 11:45 a.m.  
  1.0 Substantive CLE Hour  
  Cost $25

- **WIP Addressing Diversity Issues: Breaking Down Barriers & Being an Advocate (312)**  
  2:15 p.m. – 3:15 p.m.  
  1.0 Substantive CLE Hour  
  Cost $25

- **Nursing Home Litigation Update (318)**  
  2:15 p.m. – 3:15 p.m.  
  1.0 Substantive CLE Hour  
  Cost $25

- **WIP Technology and the Work/Life Balance (313)**  
  3:30 p.m. – 4:30 p.m.  
  1.0 Ethics CLE Hour  
  Cost $25

- **What We Can Learn About Professionalism from Lincoln (319)**  
  3:30 p.m. – 4:30 p.m.  
  1.0 Ethics CLE Hour  
  Cost $25

**NON-CLE REGISTRATION – NO FEE TO ATTEND THESE EVENTS**

- Administrative Law Section Meeting
- Alternative Dispute Resolution Committee Meeting
- Business Law Section Meeting
- Civil Litigation Law Section Meeting
- Energy Shale Development Committee of the Business Law Section Meeting
- House of Delegates Meeting
- Intellectual Property Law Section Meeting
- Labor & Employment Law Section Meeting
- Minority Bar Committee Meeting
- Minority Bar/WIP/Solo & Small Firm/Civil & Equal Rights/Gay & Lesbian Rights/PA Bar Foundation Reception
- New Delegates Orientation Breakfast
- PA Bar Foundation Directors and Members Annual Meeting
- PA Assn. of Bar Executives (PABE) Meeting
- SCOTUS Same-Sex Marriage Roundtable Discussion
- Tax Law Section Meeting/Reception
- Unauthorized Practice of Law Committee Meeting
- Workers’ Compensation Law Section Meeting
- Young Lawyers Division Business Meeting

(Include the Annual Meeting Registration fees, CLE fees & Meal Functions)

TOTAL DUE $_________

(From bottom of page 4)

- My check, payable to PBA, is enclosed.
- Charge my □ MasterCard □ Visa □ Discover □ American Express

Acct: ____________________________  
Exp. ______________ Date __________

Signature ________________________ Date __________

Cancellation Policy: Pre-registration deadline for Annual Meeting is April 26. After that date, all registrations will be accepted on a space-available basis. Written cancellation for any portion of Annual Meeting registration, including meals, must be received by noon on May 3. Upon receipt, a refund will be issued minus a $25 administrative fee.

Return to: Meetings Department, PBA, P.O. Box 186, Harrisburg, PA 17108-0186 or fax credit card registration to 717-213-2507. For more information call 1-800-932-0311, ext. 2234. Registrations will not be processed without payment.

**SEE PAGE 6 FOR HOTEL RESERVATION INFORMATION.**
Hotel Registration Information

Pennsylvania Bar Association
Real Property, Probate & Trust Law Section Annual Meeting/
Pennsylvania Bar Association Annual Meeting

May 8-10, 2013 • Pittsburgh

The Pennsylvania Bar Association is holding a block of guest rooms for the Annual Meeting at the Wyndham Grand Pittsburgh Downtown, 600 Commonwealth Place, Pittsburgh, Pa. 15222.

Group Rates are: $139.00 per room per night Single/Double Occupancy; $149 per room per night Triple/Quad Occupancy

Rates include overnight accommodations only and are subject to applicable taxes. Group rates are guaranteed only until April 15, 2013. Reservations received after April 15, 2013, will be accepted on a space available/rate available basis only.

TO MAKE YOUR RESERVATION ONLINE:
Go to: www.pabar.org; click on Events Calendar; May 8-10, click on PBA Annual Meeting; and choose Hotel Reservations.

TO MAKE YOUR RESERVATION BY PHONE:
Call 1-800-Wyndham (996-3426). Identify yourself as a participant in the Pennsylvania Bar Association Annual Meeting or use the Group Code #05066781PE to qualify for the group rate.