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Estate Planning & Probate Section

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Estate Planning & Probate Section Upcoming Breakfast Dates

- Wednesday, March 14th
- Wednesday, April 11th
- Wednesday, May 9th

More information on these dates to come

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Natalie Kelly and Jonathan Hawkins discuss “Navigating Changing Law Firms, Transacting Buyouts, and Closing Down a Practice”

By Allison L. Byrd, *Morgan & DiSalvo, P.C.*

The Estate Planning and Probate Section of the Atlanta Bar Association was privileged to welcome Natalie R. Kelly and Jonathan E. Hawkins as the featured speakers at the November 8, 2017 breakfast meeting, where they discussed the benefits, pitfalls, and challenges of closing or moving a law practice. Ms. Kelly is the Director of the Law Practice Management Program at the State Bar of Georgia, where she assists lawyers and their employees with the various aspects of law practice management. Mr. Hawkins is a partner at Krevolin & Horst, LLC, where he advises clients on law firm structure and dissolutions, business divorces and fiduciary litigation, and complex civil litigation.

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The 14th Annual Estate Planning Forum Features Professor Christopher Hoyt Discussing Planning With Retirement Account for Clients in Second Marriages and How to Realize Income Tax Savings With Charitable Bequests

By Loraine M. DiSalvo, *Morgan & DiSalvo, P.C.*

On November 14, 2017, the Estate Planning & Probate and Tax Law Sections of the Atlanta Bar Association, along with Diversified Trust Company, Inc., held the 14th Annual Atlanta Estate Planning Forum. This year's speaker was Professor Christopher Hoyt of the University of Missouri Kansas City School of Law. Professor Hoyt divided his presentation into two topics: "Retirement Accounts: Challenges with Second Marriages" and "Income Tax Savings From Charitable Bequests."

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An Update on Heirs Property in Georgia

By Jarter Gao, *Morris Legal and Tax LLC*

The Estate Planning and Probate Section of the Atlanta Bar Association was privileged to welcome Skipper G. StipeMaas, Executive Director of the Georgia Heirs Property Law Center, and Joann E. Johnston, Legal Programs Director of the Georgia Heirs Property Law Center, as the featured speakers at the January 10, 2018 breakfast meeting. Ms. StipeMaas and Ms. Johnston discussed the history of the Georgia Heirs Property Law Center (<https://www.gaheirsproperty.org/>), the problems arising from heirs property in Georgia, and how these problems can be resolved or prevented.

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Special Needs Triage: Issues for Estate Planners

By Kim C. Martin, *Nadler Biernath LLC*

Editors' Note: The following article is a summary of a presentation given by Kim C. Martin on December 13, 2017, at the monthly breakfast of the Estate Planning and Probate Section of the Atlanta Bar Association.

A challenge for any attorney whose practice includes special needs planning is to help families balance the needs of their special needs children with those of their typical children. When I meet with families to prepare a special needs estate plan, we talk about how to get a child qualified for benefits, how to create a long-term plan that will allow the child to keep those benefits, and how to spread the family's resources among more than one child when the needs are not necessarily equal.

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