



Auditor
Charles E. Walder
Chief Fiscal Officer

Return Voucher Form

Date: **09/14/2023**

To: Elected Official, Department head, or Accounting Staff of **Probate Court**

From: Auditor's Office Fiscal Department

SUBJECT: Batch # 2023-00002269

Ohio State Bar Association \$395.00

<input type="checkbox"/> Dept. Head Signature Missing on Cover	<input type="checkbox"/> Incorrect Vendor Numbers (s)
<input type="checkbox"/> Incorrect Account Number	<input type="checkbox"/> Incorrect/No Encumbrance No.
<input type="checkbox"/> Incorrect Remit Address	<input type="checkbox"/> Incorrect Voucher Amount
<input type="checkbox"/> Insufficient Cash Balance Available	<input type="checkbox"/> Incorrect G/L Date
<input type="checkbox"/> Batch not Approved in New World	<input type="checkbox"/> Expense Precede Encumbrance
<input type="checkbox"/> Insufficient Balance Available on PO	<input type="checkbox"/> Remit Copy Missing
<input type="checkbox"/> Missing Original Invoice/Supporting Documents	<input type="checkbox"/> Due Date Deadline Missed
<input type="checkbox"/> Missing "OK to Pay" Initials/Signature	<input checked="" type="checkbox"/> Other

Solution: No original signature. Remit does not match New World.

Courthouse Annex, 231 Main Street, Suite 1A, Chardon, OH 44024-1293

Direct Line: (440) 279-1600

FAX: Fiscal Office (440) 279-2184 * Real Estate/ Appraisal (440) 286-4359

Web site: <http://www.auditor.co.geauga.oh.us>

Email: auditor@co.geauga.oh.us

**AUDITORS CERTIFICATION OF FUNDS
O.R.C. 5705.41D**

Geauga County, Chardon, Ohio January 3, 2023
I HEREBY CERTIFY that the money required to meet the foregoing contract, agreement, or obligation in the sum of \$25,000.00

has been lawfully approved, authorized or directed for such purpose and is in the Treasury or in the process of collection to the credit of the fund listed next to the item below, free from any previous encumbrances.

**CHARLES E. WALDER
GEAUGA COUNTY AUDITOR**

by _____, Deputy Auditor
GEAUGA COUNTY FEDERAL I.D. NO. 34-6001208
SALES AND USED TAX EXEMPTION - POLITICAL SUBDIVISION
STATE OF OHIO

FOR AUDITORS USE ONLY	Date: _____
Then and Now Certificate: _____	
Warrant Received by: _____	
Date: _____	

SHIP TO:
GEAUGA COUNTY
PROBATE / JUVENILE COURT -JUDGE GRENDALL
231 MAIN STREET SUITE 2
CHARDON, OH 44024

WARRANT NO.	VOUCHER DATE	VOUCHER AMOUNT
	9/18/2023	\$ 395.00 ✓
P.O. DATE	ADJUSTMENT	ACCOUNT NO.
01/03/2023		
1099 AMT.	dr.	
	cr.	

PURCHASE ORDER NO. 2023-00001367 ✓

GEAUGA CO. BOARD OF COMMISSIONERS: SESSION _____ RESOLUTION _____ JOURNAL _____ PAGE _____ BUDGET APPROVAL - ENCUMB _____ VOUCHER _____
--

VENDOR I.D. NO. 30974

PURCHASED FROM:

Ohio State Bar Association

INVOICE TO:
GEAUGA COUNTY
PROBATE / JUVENILE COURT -JUDGE GRENDALL
231 MAIN STREET SUITE 2
CHARDON, OH 44024

Kimberly [Signature]
DEPARTMENT HEAD SIGNATURE

QUANTITY	UNIT	FUND	DESCRIPTION	UNIT COST	TOTAL COST
1.0000	Each	1001	Other Expenses - Other 1001-008-00-901 - Other 25,000.00 Registration - MH	25,000.0000	\$25,000.00
TOTAL DUE					\$25,000.00

RECEIVED
SEP 13 2023
Geauga County Auditor

**Presented by Court as a
courtesy only,
NOT statutorily required**
See State ex rel. Grendell v. Walder,
Slip Opinion No. 2022-Ohio-204

FILED
COMMON PLEAS COURT

IN THE COURT OF COMMON PLEAS
PROBATE DIVISION
GEAUGA COUNTY, OHIO

2023 SEP 13 AM 11:56

PROBATE-JUVENILE
DIVISION
GEAUGA COUNTY, OHIO

NOT
FOR
VETTING

IN RE:) JUDGE TIMOTHY J. GRENDALL
PROBATE COURT)
EXPENDITURES)
OHIO STATE BAR ASSOCIATION) **PROPER ADMINISTRATIVE ORDER**
) **2023-210**

Pursuant to R.C. 319.16(A)(2), this order hereby directs timely payment by the Geauga County Auditor in the amount of \$395.00 (Three Hundred Ninety Five Dollars and No Cents) from 1001-008-00-901 payable to OHIO STATE BAR ASSOCIATION, to be mailed to PO BOX 16562, COLUMBUS, OH 43216-6562, for Marvin R. Pliskin Advanced Probate and Estate Planning Institute registration fee for Staff Attorney, which the Probate Court has determined to be an expenditure for a proper public purpose. **Kindly provide this Court with the original check which it will mail to the vendor.**

Pursuant to R.C. 319.16(D), "if the auditor questions the validity of [this] expenditure... the auditor shall notify the court that presented the documents, shall issue the warrant under protest, and shall notify the auditor of state of the protest."

As an elected official and member of the judicial branch of county government, the Judge of the Geauga County Probate/Juvenile Court is authorized to fix the amount due to court vendors who perform services for the court. Therefore, pursuant to R.C. 307.55(A), this payment is to be processed "Live".

IT IS SO ORDERED.


TIMOTHY J. GRENDALL, JUDGE

KL 9/13/2023

CC: Fiscal Director



Checkout

1 SUPREME COURT NUMBER 2 3 4

Supreme Court Number

Your Supreme Court number is used for attorney identification and to assign credit for your CLEs upon completion of purchased courses.

Supreme Court Number

0098977

ORDER SUMMARY

Marvin R. Pliskin Advanced ✓
Probate and Estate Planning
Institute - In-Person Live
Columbus Location

\$395.00 ✕

Total

\$395.00 ✓
K

Promo Code

APPLY



Member Tools & Benefits



DESCRIPTION:

Honorable members of Ohio's probate bench headline this year's seminar. Attend this popular annual program to listen in on a panel discussion covering various trending topics, among judges and magistrates, learn how to incorporate asset protection into clients' estate plans, plus get up-to-date guidance for Secure Act 2.0 and how to navigate the Corporate Transparency Act.

As the 134th Ohio General Assembly was busy regarding probate law, one presentation will provide updates on wrongful death beneficiary claims, the enactment of post nuptial planning and notary modernization.

Space for in-person is limited to 150 attendees, so please register early to join your colleagues across the state for exceptional programming, catered meals, an ice cream break and a post-seminar reception sponsored by the Ohio State Bar Foundation. Alternatively, those who cannot attend in-person can register to attend the institute remotely online.

COURSE PLANNERS:

OSBA ESTATE PLANNING, TRUST AND PROBATE LAW SECTION CHAIR

Brian C. Dymally, Esq., *The Huntington Private Bank, Cincinnati*

PLANNING COMMITTEE CHAIR

Paul H. Singer, Esq., *Wilmington Co., OH, Cincinnati*

PLANNING COMMITTEE VICE-CHAIR

Heidi M. Jankov, Esq., *First National Bank, Mount Vernon*

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- Jane M. Franklin, Esq., *Wood and Lamping, Attorney at Law, Cincinnati*
- John T. James III, Esq., *Wyers, Sater, Seymour and Prosser, Columbus*
- Allyle B. Lee, Esq., *Schmidler Family South LLC, OH, Cincinnati*
- David A. Brinkley, Esq., *The Huntington Private Bank, Dayton*
- John B. MacLean, Esq., *Law Succession & Mediation LLC, Cincinnati*
- Gregory F. Mohr, Esq., *The Cincinnati Franchising Group, Cincinnati*
- M. Elizabeth Monahan, Esq., *Schmidler Family South LLC, OH, Cincinnati*
- Susan L. Abery, Esq., *bocker filio LLP, Cincinnati*
- Zachary J. Stockman, Esq., *Coltco, Kent & Cincinnati LLP, Cincinnati*
- John A. Hill, Esq., *John Robinson & Robinson LLP, Cincinnati*
- Kristen M. Tucker, Esq., *law offices of Weidner, The "Shaker" Lodge*

PROGRAM AGENDA

7:30 Registration and Breakfast for In-Person Attendees

8:15 Welcome/Opening Remarks

Paul A. Singer, Esq., *Wilmington Co., OH, Cincinnati*

8:30 View From the Bench: Ohio Probate Court Judge Panel Discussion

A panel of honorable members from the probate bar have a lot to talk about regarding issues they see in their courtrooms each day and ensuring probate law is applied more uniformly across the state.

Moderator:

Zach J. Stockman, Esq., *Coltco, Kent & Cincinnati LLP, Cincinnati*

Panelists:

- Judge David B. Berman, *Montgomery County Probate Court, Dayton*
- Chief Magistrate Leslie M. Swering, *Cuyahoga County Probate Court, Cleveland*
- Chief Magistrate Paul Hollmann, *Hamilton County Probate Court, Cincinnati*

9:45 Break

10:00 SECURE Act 2.0: What – I Was Just Getting Used to the First One!

Last year's seminar had a two-part presentation on practical estate planning for retirement benefits after the SECURE Act, and this year's presenters will bring everyone up-to-date.

David E. Brinkley, Esq., *The Huntington Private Bank, Cincinnati*
 Daniel E. Altmann II, Esq., *The Huntington Private Bank, Cincinnati*

11:00 Ohio – The Heart of It All, Including Asset Protection, Find It Here

The Buckeye State is a great one for asset protection, and these faculty members will provide an outline of ways estate planners can incorporate this area of law into their respective practices.

J. James "Bo" Tomlin, Esq., *bocker filio LLP, Cincinnati*
 Emily S. Post, Esq., *Wyers, Sater, Seymour and Prosser, Cincinnati*

12:00 Lunch (Provided for In-Person Attendees)

1:30 Selected Highlights From the 134th General Assembly: Wrongful Death Beneficiary Claims and Notice Provisions, Enactment of Post Nuptial Agreements, Notary Modernization and More

A panel of experienced practitioners provides guidance regarding recent changes in Ohio law involving wrongful death beneficiary claims, post nuptial agreements, notary modernization and other topics.

Susan L. Abery, Esq., *bocker filio LLP, Cincinnati*
 Jason C. Schneider, Esq., *Schmidler Law LLC, Columbus*
 Joseph M. Weirbach, Esq., *law offices of Susan Prosser Weirbach, Mentor*

3:00 Break

3:15 Through the Looking Glass – A Practitioner's Guide to the Corporate Transparency Act

The Corporate Transparency Act was passed as an anti-money laundering law to prevent bad actors from concealing corporate ownership. The faculty member will provide an introductory guide to the same for estate planners.

Joseph M. Weirbach, Esq., *Coltco, Kent & Cincinnati LLP, Cincinnati*

4:00 The Rules of Engagement: How To Prepare Attorney-Client Contracts for Probate Matters (Professional Conduct)

Probate and estate planning attorneys are seeing a rise in ethical and legal malpractice claims. This presentation will focus on getting off on the right foot with a strong attorney-client contract.

Kristen M. Tucker, Esq., *Ohio Bar Liability Insurance Company (OBLIC), Columbus*

5:00 Closing Remarks

Wendy M. Finkbe, Esq., *First National Bank, Mount Vernon*

5:15 Social Reception With Food and Beverages

(Concludes at 6:30)

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Ohio Bar Liability Insurance Co.

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HOW TO REGISTER

Online:

Register for In-Person Attendance: OhioBar.org/CLE23-107
 Register for Live Interactive Webinar: OhioBar.org/CLE23-107-LIW

Phone: (800) 232-7124 | (614) 487-6585

Mail:

Ohio State Bar Association
 P.O. Box 6562, Columbus, OH 43265-6562

Cancellation Policy:

Unable to attend this program after registering? You have options! Cancel your registration to days or more from the date of the program for a 100% refund, or you can transfer to another event or CLE of equal or lesser value. If you initially registered for an in-person program, you can switch to the webinar format (if applicable) for the same program at any time. If you do need to make a change to your registration, give the Ohio Bar Member Service Center a call at (800) 232-7124. They'll be happy to help you!

Register for this course: ohioBar.org/CLE23-107 or ohioBar.org/CLE23-107-LIW

Register for this course: **(800) 232-7124**

REGISTRATION FORM & TUITION ON BACK

CLE23-107

REGISTRATION INFO

Name _____

Phone _____ Fax _____

City _____ State _____ Zip _____

Email _____

Member No. / Supreme Court No. _____

SELECT LOCATIONS

Columbus

Live Interactive Webinar

PROGRAM PRICING (INCLUDES ELECTRONIC MATERIALS ONLY)

Membership VP+ and Membership	Non-Member
Pre-Registration <input type="radio"/> \$395	<input type="radio"/> \$494

Register for In-Person: ohioabar.org/CLE23-107

Register for Live Interactive Webinar: ohioabar.org/CLE23-107-LIW

GROUP DISCOUNT: Three or more registrants from the same office receive \$25 off per registrant when registering for the full-day conference. Registrations must be submitted at the same time to be eligible.

FORM OF PAYMENT

Enclosed is a check for: \$ _____

Make check payable to: Ohio State Bar Association

Credit Card: Visa Mastercard American Express Discover

Card Number: _____ Exp. / _____

Signature: _____



6.5 HOURS



SEPT. 22

The CLE You Need,
The Way You Want It



**Marvin R. Pliskin Advanced Probate
and Estate Planning Institute**

It's Your Choice -- Live CLE Credit:
Join Us In-Person or via Webcast

- Qualifies for 1.0 Professional Conduct Hours
- Approved for 6.5 OSBA Estate Planning, Trust and Probate Law Certification Hours
- Approved for 6.5 OSBA Elder Law Certification Hours

Thank You to Our Sponsors



Thank You to Our Exhibitors



DATE, TIME AND LOCATIONS
SEPT. 22 | 7:30AM - 5:15PM
In-Person: Ohio Bar Headquarters
 Ohio State Bar Association
 1700 Lake Shore Drive, Columbus, 43204
Live Interactive Webinar
 Overnight Accommodations (Limited Availability)
 Hyatt Place Columbus/OSU
 795 Yard Street
 Columbus, OH 43212
 Reservations can be made by calling (888) 492-8847 or
 via the hotel website at www.hyatt.com
 utilizing the group booking code **OSPR**. Reservations
 must be made by **Aug. 23, 2023**.

**Marvin R. Pliskin Advanced Probate
and Estate Planning Institute**



REGISTER ONLINE:
ohioabar.org/CLE23-107
ohioabar.org/CLE23-107-LIW



REGISTER BY PHONE:
 (800) 232-7124

Return Service Requested

Ohio Bar
 OHIO STATE BAR ASSOCIATION
 P.O. BOX 16582
 COLUMBUS, OHIO 43216-6582

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PLANNING COMMITTEE VICE CHAIR

Alfred M. Finkler, Esq., Park National Bank, Mount Vernon

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- John C. Mohr, Esq., Eastern Ohio Law & Judicial, LLC, Cincinnati*
- W. Thomas C. Cook, Esq., Adam Reiser & Pines, Cincinnati*
- Jan M. Franklin, Esq., Health and Learning, Attorney at Law, Cincinnati*
- John F. Franklin, Esq., Health and Learning, Attorney at Law, Cincinnati*
- Walter E. Rice, Esq., Schreyer, Suter, Spitzer and Phipps, Columbus*
- John F. Rice, Esq., Schreyer, Suter, Spitzer and Phipps, Columbus*
- Daniel B. Griffin, Esq., The Columbus School of Law, Columbus*
- John B. Weisner, Esq., Park National Bank, Mount Vernon*
- Ernest J. Walker, Esq., The Cleveland Foundation, Cleveland*
- W. Elizabeth Winkler, Esq., Schreyer, Suter, Spitzer and Phipps, Columbus*
- Scott J. Blythe, Esq., Jackson Elder Law, LLC, Cincinnati*
- Zachary J. Stockhouse, Esq., Collier, Huber & Grunwald, LLP, Cleveland*
- John A. Lutz, Esq., M&B International & Advisors, LLC, Cleveland*
- Walter "Mac" Thibault, Esq., Law Offices of Walter "Mac" Thibault, Toledo*

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Edward P. Morrow III, Esq., The Huntington Private Bank, Cincinnati

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Elaine M. Hildebrand, Esq., The Huntington Private Bank, Cincinnati
Emily S. Pelt, Esq., Hays, Suter, Spitzer and Phipps, Columbus

12:00

Lunch (Provided for In-Person Attendees)

1:30

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Ally T. Popoff, Esq., The Ohio State Bar Association, Columbus
Susan P. Schreyer, Esq., Schreyer, Suter, Spitzer and Phipps, LLC, Columbus
Susan P. Rickard, Esq., Law Offices of Susan P. Rickard, Mentor

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Brookline Member Walter, Esq., Ohio Bar Liability Insurance Company (OBLIC), Columbus

5:00

Closing Remarks

Alfred M. Finkler, Esq., Park National Bank, Mount Vernon

5:15

Social Reception With Food and Beverages (Concludes at 6:30)

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REGISTRATION FORM & TUITION ON BACK