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Cleveland, Ohio 44126



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2021

CONTINUING LEGAL EDUCATION APRIL - DECEMBER 2021

We will be offering Professional Conduct
four times via Live Interactive Webinars

CLE at a Reasonable Price

TUITION: \$23 PER CREDIT HOUR

No confirmation notices will be sent. Your registration is guaranteed when payment is received. \$25.00 administrative fee charged for all refunds. No charge to re-schedule classes.

ALL 24 Hours
May Be Taken via
Live Interactive
Webinars.

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Gilbride & Company

440-250-9090 or
Call Toll Free 866-333-6856

21776 North Park
Cleveland, Ohio 44126

Fax 440-734-2258
www.gilbrideCLE.com



BASIC ESTATE PLANNING 3.0 Credit Hrs. REVISED & UPDATED

9:00 AM - 12:30 PM

This popular course is a comprehensive overview of estate planning. The presentation emphasizes the planning process, including information and data gathering and guidelines for interviewing the client. The presentation covers wills, trusts, taxes, costs and intestate distributions, property titling, and other relevant topics. There are sections devoted to digital assets, guns and gun trusts, pets and pet trusts. Throughout, we focus on discovering and articulating the client's objectives and ultimately constructing the estate plan that makes the most sense for each unique client. **Level of difficulty - Basic** This course has been approved by the Ohio Supreme Court Commission on Continuing Legal Education for 3.0 total CLE hours of instruction, including 0.00 hours in ethics, 0.00 hours in substance abuse, and 0.00 hours in professionalism instruction.

ADVANCE DIRECTIVES - APPROVAL & CRITICISM 3.0 Credit Hrs. REVISED

1:30 PM - 5:00 PM

We have revised this course to bring you up to date regarding advance directives. Although the importance of these documents has not diminished, many practitioners believe there is room for improvement. This presentation provides a brief review of standard documents used in Ohio for healthcare and end of life issues. It then goes on to introduce you to the Five Wishes - A Living Will Document and the Medical Orders for Life-Sustaining Treatment (MOLST), a new form used as a substitute for a Do Not Resuscitate Order (DNR). **Level of difficulty - Intermediate** This course has been approved by the Ohio Supreme Court Commission on Continuing Legal Education for 3.0 total CLE hours of instruction, including 0.00 hours in ethics, 0.00 hours in substance abuse, and 0.00 hours in professionalism instruction.

JUDGMENT & DECISION MAKING 3.0 Credit Hrs. REVISED FOR 2021

9:00 AM - 12:30 PM

The human brain has two thinking systems. There is a fast-thinking system that makes instantaneous decisions and a much slower system that produces reasoned judgments. Some of our judgments are efficacious, but others are shortsighted or flat-out wrong. Sometimes we make good decisions; at other times, we make mistakes. This course focuses on what science has to say about how one can better judge things and make better decisions. **Level of difficulty - Intermediate** This course has been approved by the Ohio Supreme Court Commission on Continuing Legal Education for 3.0 total CLE hours of instruction, including 0.00 hours in ethics, 0.00 hours in substance abuse, and 0.00 hours in professionalism instruction.

INVESTMENT ADVICE 3.0 Credit Hrs. REVISED & UPDATED

1:30 PM - 5:00 PM

Clients often ask their lawyers for investment advice. In some cases, this is a direct request to comment on an investment product. In other cases, it is indirect. In either case, it is a request for an attorney to render non-legal advice. Should an attorney give such advice? Is an attorney barred from giving investment advice? Under what circumstances is it permissible? This course will give you insight into the practice of law as it relates to giving investment advice. It will give you an introduction to the world of investments, investment products, and investment advice. This background information will help you decide when to give advice about investments and when to decline. **Level of difficulty - Basic** This course has been approved by the Ohio Supreme Court Commission on Continuing Legal Education for 3.0 total CLE hours of instruction, including 0.00 hours in ethics, 0.00 hours in substance abuse, and 0.00 hours in professionalism instruction.

EMPLOYMENT LAW 3.0 Credit Hrs. UPDATED FOR 2021

9:00 AM - 12:30 PM

What is going on in the world of employment and labor law? This seminar provides an overview of employment and labor law and then examines hot topics regarding wage and hour issues, wrongful discharge, discrimination, harassment, FMLA, and much more. **Level of difficulty - Intermediate** This course has been approved by the Ohio Supreme Court Commission on Continuing Legal Education for 3.0 total CLE hours of instruction, including 0.00 hours in ethics, 0.00 hours in substance abuse, and 0.00 hours in professionalism instruction.

THE SECURE ACT 3.0 Credit Hrs. NEW!!!

1:30 PM - 5:00 PM

This recently enacted legislation represents changes in the federal laws that govern qualified retirement plans. In this presentation, we review the changes to existing law and discuss the Act's new provisions. This introductory information will help you keep your business clients informed about how the SECURE Act affects the retirement plans they offer to their employees. It will help you keep your clients up to date about their retirement benefits. **Level of difficulty - Basic** This course has been approved by the Ohio Supreme Court Commission on Continuing Legal Education for 3.0 total CLE hours of instruction, including 0.00 hours in ethics, 0.00 hours in substance abuse, and 0.00 hours in professionalism instruction.

THE ESTATES OF DEAD CELEBRITIES - WHAT WENT WRONG? 3.5 Credit Hrs. NEW!!!

9:00 AM - 1:00 PM

The estates of high-profile celebrities receive a lot of publicity. Unlike private citizens' estates, we can examine these high-profile estates to see how effective the estate planning and estate plans were. We can see if they accomplished the objectives of the estate owners. We can see what worked and what failed. We can learn and hopefully improve the quality of estate planning going forward. This course will examine many celebrities' estates, including John D. Rockefeller and Pablo Picasso, from Joan Crawford to Elizabeth Taylor, from Elvis to Prince, Tom Petty, Paul Newman, Aretha Franklin, and many more to see what lessons estate planners can learn. **Level of difficulty - Basic** This course has been approved by the Ohio Supreme Court Commission on Continuing Legal Education for 3.5 total CLE hours of instruction, including 0.00 hours in ethics, 0.00 hours in substance abuse, and 0.00 hours in professionalism instruction.

PROFESSIONAL CONDUCT - MORAL PHILOSOPHY AND LEGAL ETHICS 2.5 Credit Hrs. NEW!!!

2:00 PM - 4:45 PM

This course will satisfy the 2.5 credit hour requirement for professional conduct training that each Ohio attorney must earn every two years to maintain his/her license. Before the Ohio Code of Professional Conduct existed, moral philosophy was the barometer for professional conduct and ethical behavior. Fundamentally, moral philosophy deals with right and wrong. Moral philosophy is the foundation of any code of professional conduct. In this presentation, we discuss moral philosophy and examine how it has contributed to forming the Ohio Code of Professional Conduct. **Level of difficulty - Basic** This course has been approved by the Ohio Supreme Court Commission on Continuing Legal Education for 2.5 CLE credit hours for professional conduct instruction.

SOCIAL SECURITY & MEDICARE LAW 3.0 Credit Hrs. UPDATED FOR 2021

9:00 AM - 12:30 PM

This course is a briefing on Social Security and Medicare rules and regulations. We review eligibility and benefits and identify beneficiaries. There is an update on the financial status of both Social Security and Medicare. Social Security Disability claims and expedited procedures for appeals and trials are covered as well. This course will bring you up to date on Social Security & Medicare Law. **Level of difficulty - Basic** This course has been approved by the Ohio Supreme Court Commission on Continuing Legal Education for 3.00 CLE credit hours, including 0.00 hours in ethics, 0.00 hours in substance abuse, and 0.00 hours in professionalism instruction.

CONSUMER PROTECTION LAW 3.0 Credit Hrs. UPDATED FOR 2021

9:00 AM-12:30 PM

In this course; we take an in-depth look at federal and state laws that have been enacted to protect consumers from unfair and deceptive business practices. We discuss various consumer protection agencies such as the Federal Trade Commission, The Federal Consumer Financial Protection Bureau, and the State Attorney General's office. There is a review of the Ohio Consumer Sales Practices Act with references to other state laws designed to protect consumers. We go on to discuss the appropriate legal response to a consumer complaint. **Level of difficulty - Intermediate** This course has been approved by the Ohio Supreme Court Commission on Continuing Legal Education for 3.00 CLE credit hours, including 0.00 hours in ethics, 0.00 hours in substance abuse, and 0.00 hours in professionalism instruction.

TRUST LAW - REVIEW AND UPDATE 3.0 Credit Hrs. NEW

1:30 PM - 5:00 PM

This course is a review of trust law and the uses and applications of trusts in various circumstances. We briefly look at the Uniform Trust Code and its multiple adaptations in different jurisdictions. We take a detailed look at the Ohio Trust Code. The presentation provides background information and insight into modern trust law. We discuss the use of trusts in estate planning and asset protection planning. The course examines lifetime and testamentary applications of trusts and how trusts are used in business and philanthropic endeavors. **Level of difficulty - Basic** This course has been approved by the Ohio Supreme Court Commission on Continuing Legal Education for 3.00 CLE credit hours, including 0.00 hours in ethics, 0.00 hours in substance abuse, and 0.00 hours in professionalism instruction.

IMPORTANT NOTICE

Due to the risks and uncertainties surrounding the Coronavirus Pandemic and for the welfare and safety of our customers, we have decided to offer all continuing legal education (CLE) classes in 2021 via Live Interactive Webinars. Therefore, we will not be offering any live classroom seminars in 2021.

ALL 24 Hours May Be Taken via Live Interactive Webinars.

Our Live Interactive Webinars will feature a live instructor using a variety of presentation materials that you will view from anywhere you have a computer and an internet connection or a smart phone. Log in to the class on the scheduled date and time and participate as prompted throughout the class. You can ask questions and make comments or simply enjoy the presentation.

Register online, call us, fax us, or register by US Mail.

APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER
<p>Wednesday, April 21 Basic Estate 9:00 am - 12:30 pm 3 cr Advance Directives 1:30 pm - 5:00 pm 3 cr</p>	<p>Wednesday, May 12 Judgment & Decisions 9:00 am - 12:30 pm 3 cr Investment Advice 1:30 pm - 5:00 pm 3 cr</p>	<p>Tuesday, June 15 Employment Law 9:00 am - 12:30 pm 3 cr The Secure Act 1:30 pm - 5:00 pm 3 cr</p>	<p>Wednesday, July 14 Dead Celebrities 9:00 am - 1:00 pm 3.5 cr Professional Conduct 2:00 pm - 4:45 pm 2.5 cr</p>	<p>Tuesday, August 10 Social Security & Medicare Law 9:00 am - 12:30 pm 3 cr Advance Directives 1:30 pm - 5:00 pm 3 cr</p>	<p>Thursday, September 23 Judgment & Decisions 9:00 am - 12:30 pm 3 cr Investment Advice 1:30 pm - 5:00 pm 3 cr</p>
OCTOBER	NOVEMBER	DECEMBER			
<p>Thursday, October 7 Dead Celebrities 9:00 am - 1:00 pm 3.5 cr Professional Conduct 2:00 pm - 4:45 pm 2.5 cr</p> <p>Wednesday, October 13 Basic Estate 9:00 am - 12:30 pm 3 cr Advance Directives 1:30 pm - 5:00 pm 3 cr</p> <p>Tuesday, October 19 Consumer Law 9:00 am - 12:30 pm 3 cr Trust Law 1:30 pm - 5:00 pm 3 cr</p>	<p>Tuesday, November 2 Judgment & Decisions 9:00 am - 12:30 pm 3 cr Investment Advice 1:30 pm - 5:00 pm 3 cr</p> <p>Thursday, November 4 Social Security & Medicare Law 9:00 am - 12:30 pm 3 cr The Secure Act 1:30 pm - 5:00 pm 3 cr</p> <p>Tuesday, November 16 Dead Celebrities 9:00 am - 1:00 pm 3.5 cr Professional Conduct 2:00 pm - 4:45 pm 2.5 cr</p> <p>Tuesday, November 23 Employment Law 9:00 am - 12:30 pm 3 cr The Secure Act 1:30 pm - 5:00 pm 3 cr</p>	<p>Thursday, December 2 Judgment & Decisions 9:00 am - 12:30 pm 3 cr Investment Advice 1:30 pm - 5:00 pm 3 cr</p> <p>Tuesday, December 7 Basic Estate 9:00 am - 12:30 pm 3 cr Advance Directives 1:30 pm - 5:00 pm 3 cr</p> <p>Tuesday, December 14 Dead Celebrities 9:00 am - 1:00 pm 3.5 cr Professional Conduct 2:00 pm - 4:45 pm 2.5 cr</p> <p>Wednesday, December 22 Consumer Law 9:00 am - 12:30 pm 3 cr Trust Law 1:30 pm - 5:00 pm 3 cr</p>			

FACULTY

Thomas M. Gilbride, ChFC

Tom is a Chartered Financial Consultant and the President of Gilbride & Company. He has produced more than sixty continuing education courses and has presented CLE seminars in Ohio for twenty-three years. For more than thirty-five years, Mr. Gilbride provided financial and business consulting services to various individual and business clients, particularly privately-held and family-owned businesses. He is an author, speaker, educator, and producer.

Ian D. Mitchell, Esq.

Ian practices in Reminger, Co., LPA's Cincinnati office, where he focuses on employer practices' defense, general liability, directors' and officers' liability, employment, commercial, and professional liability cases.

Brandon P. Smith, Public Affairs Specialist – Cleveland Office, Social Security Administration

Brandon P. Smith is a Social Security public affairs specialist with the Social Security Administration, based in Cleveland, OH. A Cleveland native, he joined the SSA in 2003. He is the primary contact for media relations, outreach, and presentations for the agency in Cuyahoga, Lake, Lorain, and Geauga counties. In addition to other communications awards, Brandon received a Deputy Commissioner Citation from Social Security's Office of Communication in 2015 for his outstanding public affairs support of the agency's national communication initiatives.

Michael P. Gilbride, Esq.

For over twenty years, Mike has defended the interests of corporate entities and individuals in civil matters. His breadth of experience allows him to handle a wide variety of claims. Over the years, he has counted among his clients; automobile and boat manufacturers, attorneys, insurance agents, trucking and transportation companies, business owners, multi-national corporations, and small businesses. He has handled and continues to handle cases in the areas of Product Liability, Lemon Law/Warranty Law, Professional Malpractice, Business Disputes, Commercial Litigation, Construction Design/Manufacturing Defects, and in the general area of Insurance Defense.

Jennifer L. Scroggs, Esq.

Jennifer L. Scroggs serves as Premier Bank's Vice President, Director of Trust. She specializes in interpreting, communicating, facilitating, and executing complex estate planning matters by maintaining knowledge of current trends and changes with regard to fiduciary matters. Jennifer has experience managing complex family dynamics, intergenerational interests, and trusts and estates with unique assets. In her role, she collaborates with high net worth individuals and their advisors to articulate their goals and needs, develop a comprehensive wealth plan, and coordinate both internal and external advisors to implement the plan.

PLEASE ENROLL ME IN THE FOLLOWING COURSES:

Course Name	Course Date	Location	Cost
Your Attorney Registration # _____			TOTAL

Your Name _____

Firm Name _____

Business Address _____ City _____ State _____ Zip _____

Home Phone _____ Work Phone _____ E-mail Address _____

METHOD OF PAYMENT (Please Make Payable to Gilbride & Company) Visa Master Card Discover Check or Money Order

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