



**NATIONAL COLLEGE OF PROBATE JUDGES
2023 SPRING CONFERENCE AGENDA**

***May 9 – 12, 2023
Loews Ventana Canyon Hotel
Tucson, AZ***

Tuesday, May 9, 2023		
Date/Time	Session	<u>Location</u>
2:00 PM – 5:00 PM	Registration	Ballroom Foyer
5:30 PM – 6:00 PM	New Member Reception	Upper Terrace
6:00 PM – 7:00 PM	Welcome Reception	Upper Terrace

Wednesday, May 10, 2023		
Date/Time	Session	<u>Location</u>
8:00 AM – 12:30 PM	Registration	Ballroom Foyer
8:00 AM – 12:30 PM	Vendor Exhibits and Coffee Service	Ballroom Foyer
8:30 AM – 8:35 AM	Opening and Welcome Remarks by Judge <i>Dianne E. Yamin, NCPJ President</i>	Catalina Ballroom
8:35 AM – 8:45 AM	Lexis Nexis Sponsor Presentation	Catalina Ballroom
8:45 AM – 9:00 AM	Bond Services of Arizona Sponsor Presentation	Catalina Ballroom
9:00 AM – 10:30 AM	Assisted Outpatient Treatment Presentation <i>Betsy Johnson, Amy Lukes, Elizabeth Sinclair Hancq</i>	Catalina Ballroom



NATIONAL COLLEGE OF PROBATE JUDGES 2023 SPRING CONFERENCE AGENDA

10:30 AM – 10:45 AM	Break	Foyer
10:45 AM – 12:30 PM	Assisted Outpatient Treatment Presentation (Continued)	Catalina Ballroom
1:00 PM	Golf Outing	Loews Golf Course

Thursday, May 11, 2023		
Date/Time	Session	<u>Location</u>
8:00 AM – 12:00 PM	Information Desk	Foyer
8:30 AM – 12:30 PM	Vendor Exhibits and Coffee Service	Foyer
8:40 AM – 8:50 AM	Advocord Sponsor Presentation	Catalina Ballroom
8:50 AM – 9:00 AM	Kofile Sponsor Presentation	Catalina Ballroom
9:00 AM – 10:30 AM	The Ann Heche Case Study <i>Bryan Phipps</i>	Catalina Ballroom
10:30 AM – 10:45 AM	Break	Foyer
10:45 AM – 12:15 PM	Electronic Wills <i>Letitia M. Maxfield, Adam M. Fried</i>	Catalina Ballroom
12:15 PM – 12:30 PM	Yondr Sponsor Presentation	Catalina Ballroom
12:45 PM – 5:00 PM	Executive Committee Meeting	Rincon
6:00 PM – 7:00 PM	Reception	Bill's Grill
7:00 PM – 9:00 PM	Dinner (<i>Business Casual attire</i>)	Canyon Café/Saguaro



NATIONAL COLLEGE OF PROBATE JUDGES 2023 SPRING CONFERENCE AGENDA

Friday, May 12, 2023		
Date/Time	Session	Location
8:00 AM – 12:30 PM	Coffee Service	Foyer
8:00 AM – 9:00 AM	State Representatives Meeting	Coronado
9:00 AM – 9:45 AM	Benefits of the Dave Thomas Foundation for Adoption <i>Rita Soronen</i>	Catalina Ballroom
9:45 AM – 10:45 AM	Probate Lessons from the Princess Bride <i>Judge James Walther</i>	Catalina Ballroom
10:45 AM – 11:00 AM	Break	Foyer
11:00 AM – 11:45 AM	Adoption Day Event <i>Judge Fredericka and Magistrate Emily Clark Weston</i>	Catalina Ballroom
11:45 AM – 12:30 PM	Establishing a Help Center <i>David Welty</i>	Catalina Ballroom



NATIONAL COLLEGE OF PROBATE JUDGES 2023 SPRING CONFERENCE AGENDA

Course Descriptions:

Assisted Outpatient Treatment

Presented by Betsy Johnson, Amy Lukes, and Elizabeth Sinclair Hancq

AOT is the practice of providing community-based treatment under court order to SMI caught in the “revolving doors” of hospitalization and incarceration. Studies demonstrate that quality AOT programs can dramatically reduce these negative outcomes. This presentation provides an overview of AOT, reviews key research, and examines components of successful programs.

The Ann Heche Case Study

Presented by Bryan Phipps

The presentation will provide unique analysis and personal insights into the contested probate appointment process within the Estate of Anne Heche.

Electronic Wills

Presented by Letitia (Letty) Maxfield and Adam M. Fried

Why are we so resistant to change? E-wills, are they here to stay? Will they really lead to increased incidents of fraud? Stemming from a sample e-will execution, this session will discuss the history of wills and, since change is coming, how jurisprudence may need to adapt.

Dave Thomas Foundation for Adoption: Permanency for All Children

Presented by Rita Soronen

With more than 400,000 children in the United States in foster care and 115,000 of those waiting to be adopted, the Dave Thomas Foundation for Adoption responds to the urgent need for permanency. The session will focus on the strategies and national programs of the Foundation that drive toward evidence-based solutions.

Probate Lessons from the Princess Bride

Presented by Judge James Walther

Adoption Day Event

Presented by Judge James Fredericka and Magistrate Emily Clark Weston

Judge Fredericka and Magistrate Weston will be presenting on Adoption celebrations. They will discuss the benefits of holding an Adoption Day celebration as well as discussing the planning



NATIONAL COLLEGE OF PROBATE JUDGES 2023 SPRING CONFERENCE AGENDA

process for such an event. They will share examples and ideas from successful Adoption Day celebrations.

Establishing a Help Center Presented by David Welty

Attorney Davis Welty will provide an overview of the legal issues and other concerns presented by the establishment of a Help Center for a probate court, and the ongoing operation of a Help Center.



NATIONAL COLLEGE OF PROBATE JUDGES 2023 SPRING CONFERENCE AGENDA

Speaker Bios

Judge James Fredericka

Trumbull County Probate Court, Ohio

A native and lifelong resident of Trumbull County, Judge James A. Fredericka has served as the Trumbull County Probate Court Judge since February 2015. After graduating from John F. Kennedy High School, Judge Fredericka went on to attend the University of Notre Dame and Case Western Reserve University School of Law. As a distinguished trial attorney, Judge Fredericka represented many of the residents of Trumbull County and participated in numerous professional, civic and charitable organizations, including as a past President of the Trumbull County Bar Association. Since taking office, Judge Fredericka has continued to seek ways to assist our most vulnerable residents with programs such as the Guardian Angels, Senior Court and Veterans Assistance Program.

Adam M. Fried, Esq.

Shareholder, Reminger Co., L.P.A.

Adam is a shareholder in the Trust, Estate & Probate Litigation Section of Reminger Co., LPA. He represents clients in numerous types of probate disputes that challenge estate planning documents and transfers of wealth, including will contests, trust disputes, charges of undue influence and the fraudulent use of powers of attorney. He also counsels and represents families in matters surrounding contested guardianships. His experience, including trying many probate disputes to verdict, has garnered him a reputation for developing effective litigation tactics and providing a common-sense approach to resolution.

Adam is a Fellow of the American College of Trust and Estate Counsel, has been selected as the 2015 and 2018 Best Lawyers Lawyer of the Year, Cleveland, for litigation, trusts and estates and 2019 and 2021 for elder law, Cleveland. He has also been selected as a Top 100 Lawyer in Ohio and Top 50 in Cleveland by Ohio Super Lawyers Magazine. Adam has a national reputation as a lecturer on a range of topics involving trust and estate litigation issues. Adam has also taught the Wills, Trusts and Estates course at Cleveland Marshall College of Law.



NATIONAL COLLEGE OF PROBATE JUDGES 2023 SPRING CONFERENCE AGENDA

Betsy Johnson

AOT Policy Adviser, Treatment Advocacy Center

Betsy Johnson is an AOT Policy Adviser for the Treatment Advocacy Center. She is responsible for providing technical assistance to community leaders and advocates interested in implementing and expanding quality assisted outpatient treatment (AOT) programs.

Prior to joining TAC, Betsy was the Associate Executive Director of the National Alliance on Mental Illness of Ohio for over ten years. While with NAMI Ohio, Betsy led the effort to pass Ohio's assisted outpatient treatment bill. Before joining NAMI Ohio, Betsy was the Associate CEO of the Ohio Association of County Behavioral Health Authorities. She has also worked for the Ohio Departments of Job and Family Services and Youth Services and served as a Legislative Aide in the Ohio Senate. Prior to moving to Columbus, Ohio, Betsy worked in Washington D.C. as a Member of Congress. She has a degree in Political Science from the University of Houston.

Amy Lukes

Director of AOT Implementation, Treatment Advocacy Center

Amy Lukes is the director of AOT implementation at Treatment Advocacy Center. She provides clinical consultation to the more than 20 jurisdictions new to implementing AOT and oversees TAC's contribution to the SAMHSA-funded Clinical Support System for Serious Mental Illness.

Lukes is a licensed independent clinical social worker who brings a different perspective to TAC, having worked for 17 years in community mental health with populations living with severe mental illness, including those on assisted outpatient treatment. Prior to joining TAC, she worked at Northeast Ohio Medical University overseeing projects related to suicide prevention, evidence-based treatment for opiate addiction and assisted outpatient treatment. Lukes has experience implementing several evidence-based treatments for severe mental illness, including assertive community treatment, integrated dual disorder treatment, Housing First, and individual placement and support.

Lukes graduated from Case Western Reserve University with a master's in social administration and has a bachelor's degree from Kenyon College.



NATIONAL COLLEGE OF PROBATE JUDGES 2023 SPRING CONFERENCE AGENDA

Letitia (Letty) Maxfield

Partner, Trust & Estate Advocates LLP

Letty is partner at the law firm of Wade Ash LLC located in Denver, Colorado. Her practice focuses solely on complex or controverted trust, estate, and elder law matters. She is a Fellow of the America College of Trust and Estate Counsel. On behalf of the Colorado Bar Association, she has been actively engaged in legislative policy affecting trust, estate, and elder law in Colorado since 2014. Her legislative work has included reviewing, drafting, and testifying on uniform laws, remote online notarization, and electronic wills. Over the course of her 11 years as a licensed attorney, she presented at more than a dozen continuing legal education events and served as the program co-chair for the Annual Rocky Mountain Elder Law Retreat. Letty grew up in the small town of Galena, Illinois, but settled in Colorado after attending law school at the University of Denver and now calls Conifer, Colorado her home.

Bryan Phipps, Esq.

Shareholder, Buchalter Law Firm

Bryan Phipps is a Shareholder with Buchalter in its Sacramento office and chairs the firm-wide Trust & Estate Litigation Practice Team. Mr. Phipps focuses his practice exclusively on helping individuals and families avoid and resolve inheritance disputes. He regularly assists and advises clients on proactive estate planning techniques, diligent administration of trust and probate estates, and ardent representation in court. Mr. Phipps' clients value him for his creative and effective advocacy in trust and estate disputes, including will and trust contests, fiduciary accountings, breach of trust, financial elder abuse, and court-supervised protective proceedings such as conservatorships. He is also a Certified Specialist in Estate Planning, Trust, and Probate Law by the State Bar of California Board of Legal Specialization.

Elizabeth Sinclair Hancq

Director of Research, Treatment Advocacy Center

Elizabeth Sinclair Hancq is the director of research for Treatment Advocacy Center. Hancq leads the organization's Office of Research and Public Affairs and works with TAC staff and outside researchers to carry out its research agenda. She has co-authored multiple reports that have been cited in national media, including the *Washington Post* and the *Wall Street Journal*, and has generated statistics that have been used in testimony by government officials in the highest levels of office. In addition, Hancq has published articles in prestigious academic journals including *JAMA Psychiatry* and *Nature Communications*.



NATIONAL COLLEGE OF PROBATE JUDGES 2023 SPRING CONFERENCE AGENDA

Hancq has previously worked in community health quality improvement and public health program implementation and evaluation in Washington, D.C. Prior to that, Hancq served as a research assistant at Georgetown University Lombardi Cancer Center.

Hancq earned a Master of Public Health degree from George Washington University and a bachelor's degree in physiology and neuroscience from McGill University.

Rita Soronen

President and CEO, Dave Thomas Foundation for Adoption

For more than 35 years, Rita Soronen has worked on behalf of abused, neglected and vulnerable children, providing leadership for local, state and national efforts, while striving to assure safe and permanent homes for North America's children.

Leading the Dave Thomas Foundation for Adoption (DTFA), a national nonprofit public charity, since 2001 and the DTFA-Canada since 2004, Ms. Soronen works to find permanent families for the more than 150,000 waiting children in North America's foster care systems. Under her leadership, the Foundation has significantly increased its grant-making while developing strategic, evidence-based initiatives that act on the urgency of the issue. In 2022, the Foundation dedicated nearly \$40 million to grants and award-winning programs.

Prior to the Foundation, she was executive director of CASA of Franklin County. She has also served on various boards, including the National CASA/GAL Association and was a founding member of the Congressional Coalition on Adoption Institute board.

Judge James Walther

Lorain County Court of Common Pleas Probate Division, Ohio

Jim Walther became the Judge of the Lorain County Probate Court in February of 2009. He was re-elected to that position in 2014 and 2020. He was first admitted to the practice of law in Ohio in 1987. Judge Walther worked as an Assistant Law Director for the City of Lorain and had a private law practice for 20 years, specializing in litigation and probate law.



NATIONAL COLLEGE OF PROBATE JUDGES 2023 SPRING CONFERENCE AGENDA

He is a graduate of Cleveland State University-College of Business (1984) and Cleveland State University-College of Law (1987).

In 2014, Judge Walther started the Lorain County Veterans Treatment Court and in 2018 he began the New Journey Court, an assisted, outpatient treatment track for persons with serious mental illness.

Judge Walther is the past District Chairman for Boy Scouts of America for the Great Frontier District, which served all of Lorain County. In 2015, he was the first recipient of the Lorain County Friend of 4-H Award and in 2017 he received the Ohio Friend of 4-H award.

Judge Walther is a member and President-Elect of the Ohio Association of Probate Judges and is President-Elect of the National College of Probate Judges. Judge Walther was appointed by the Chief Justice of the Ohio Supreme Court to the Board of Trustees of the Ohio Judicial College; the Advisory Committee on Children and Families; and the iCOURT Taskforce (Improving Court Operations Using Remote Technology). He is a member of the Ohio Attorney General's Elder Abuse Commission.

Judge Walther is a frequent presenter around the State of Ohio on probate, guardianship and elder law issues.

He enjoys all types of outdoor activities with his family. Judge Walther and his wife, Dawn, are lifelong residents of Lorain County, Ohio.

Magistrate Emily Clark Weston *Trumbull County Probate Court, Ohio*

Magistrate Weston grew up in Bristolville, Ohio and attended Kent State University and The University of Akron School of Law. Admitted to the bar in 2012, Magistrate Weston entered private practice before joining the Court as Staff Attorney in February 2014. She was appointed as a Magistrate in June 2016.



NATIONAL COLLEGE OF PROBATE JUDGES 2023 SPRING CONFERENCE AGENDA

David Welty, Esq.

Geauga County Probate/Juvenile Court Help Center

David W. Welty, Attorney (Ret) serves as Director of the Geauga County Probate/Juvenile Court Help Center from June 2018- Present.

David Welty attended Denison University, received his B.S. in 1971 from Miami University, and his J.D. from Case Western Reserve University School of Law in 1974. He practiced law for 44 years, approximately 10 years with his father, 20 years as a partner at Walter & Haverfield, Cleveland, Ohio, and 14 years in the law department of Linde Gas LLC. His primary focus was merger & acquisition matters and estate planning for owners of privately-owned businesses. Soon after his retirement, he assisted the Geauga County, Ohio Probate/Juvenile Court with the formation of a Help Center, and has served as its director for the past five years.



**NATIONAL COLLEGE OF PROBATE JUDGES
2023 SPRING CONFERENCE AGENDA**

Thank you to our conference sponsors!

