



ATLANTA BAR ASSOCIATION

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Estate Planning & Probate Section

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DATE

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Estate Planning & Probate Section Upcoming Events

Please plan to attend the section breakfasts on the second Wednesday of every month at the Buckhead Club:

- **April 10, 2019**
- **May 8, 2019**
- [**Check the Atlanta Bar Calendar for more details!**](#)

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Lila Newberry Bradley presents “What Estate Planning Attorneys Should know about Adoption and Assisted Reproduction”

by Clayton W. Skinner

The November 14, 2018 meeting of the Atlanta Bar Association Estate Planning and Probate Section (the “Section”) addressed the various issues at the frontline of adoption law and assisted reproduction in Georgia. The speaker, Lila Newberry Bradley, has a legal practice centered on these issues and helped to frame how they come into play in the estate planning context.

[**Read More**](#)

Farhad Aghdami presents “Key Considerations for Successful Business Succession Planning”

*by Samantha C. Page, Merritt Watson LLP
Jacquelyn H. Saylor, The Saylor Law Firm LLP
Jerry Zhang, Emory University School of Law, 3L; Extern, The Saylor Law Firm LLP*

On November 29, 2018, the Estate Planning & Probate Section of the Atlanta Bar held the 15th Annual Estate Planning Forum at Nelson Mullins Riley Scarborough, LLP in Atlanta, Georgia. The Section was honored to welcome Farhad Aghdami, the managing partner of the Richmond, Virginia offices of Williams Mullen, as a featured speaker.

[Read More](#)

David De Jong presents “Planning for Estates Under \$22 Million”

by Conner Watts, Morris Legal and Tax LLC

On November 29, 2018, David De Jong presented at the 15th Annual Atlanta Estate Planning Forum, highlighting estate planning considerations for estates under \$22 million in light of the new Tax Cuts and Jobs Act of 2017.

[Read More](#)

Helen Lally presents “Probate Bonds: Better to be Shaken than Stirred”

by Julia L. Hightower, Hendrick, Rascoe, Zitron & Long LLC

On September 12, 2018, Helen Lally, a Commercial Surety Leader at Westfield Insurance, graciously spoke to the Estate Planning and Probate Section of the Atlanta Bar Association regarding what every estate planner needs to know about fiduciary bonds.

The morning started off with a discussion of what underwriters look for in a fiduciary when issuing a fiduciary bond. Practitioners should understand that fiduciary bonds are essentially fidelity instruments, and that the prime risk to any surety is the possibility that a fiduciary will act dishonestly

[Read More](#)

Charlie Jordan and Bud Boland of Brightworth present on “The Estate Planner’s Guide to Financial Planning”

by Allison L. Byrd, Morgan & DiSalvo, P.C.

The Estate Planning and Probate Section of the Atlanta Bar Association was privileged to welcome Charlie Jordan and Christopher “Bud” Boland of Brightworth, LLC as the featured speakers at the December 12, 2018 Section Breakfast, where they presented “The Estate Planner’s Guide to Financial Planning.”

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Volunteer while networking with fellow Section members!

This year, the Board of Directors for our Section is trying something we’ve never done before, setting up networking opportunities with a charitable focus.

- **One such opportunity took place on December 8, 2018 at North Fulton Community Charities (NFCC)**, a charitable organization located in Roswell, Georgia that provides financial assistance to over 10,000 needy families and individuals in communities north of the Chattahoochee River, including Alpharetta, Cumming, Johns Creek, Milton, Mountain Park and Roswell. Section members got together to deliver large items such as bikes on behalf of NFCC.
- **Multiple times between November and March, Section members volunteered with Three-Oh-We-Go.** When the temperature was forecasted to go below freezing from November 10th to March 30th the GO-Alarm was sounded and volunteers were alerted. On GO-Nights, Section members who responded to the GO-Alarm assembled with other volunteers at 9:00pm

at ReStart 3:20, 561 W Whitehall St SW, Atlanta, GA 30310. From there we divided up routes and supplies then took to the streets with hand warmers, blankets, and winter items. Three-Oh-We-Go is in its final days for this season but will start its good work again in November 2019. Section members are welcome to sign up to receive the "GO-Alarm" at <https://projectlivelove.com/three-oh-we-go/> or by texting the word "ALARM" to 63566.

If you have any ideas for networking with a charitable focus, please email your Section Chair, Jacquelyn H. Saylor at jsaylor@saylorlaw.com and be on the lookout for more networking/volunteer opportunities in the upcoming months, including evening activities and opportunities downtown!

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