

What Can & Cannot Be Done Remotely in Estate Planning

Learn about the benefits, limits and best practices for remote lawyering in the estate planning world.

It's a brave new remote world and estate planning is no exception. During the pandemic emergency, an estate planning attorney might hold every single client conference by video, including the signing conference!

Agenda

- Prevalence of Videoconference in Estate Planning
- New Client Intake and Due Diligence
- Existing Client Updates
- Probate Court Remote Hearings
- Tech Tools and Tips for Videoconferences
- Ethics: Confidentiality, Privacy and Security
- Remote Signing Conferences
- Alternatives to Remote Signing Conferences
- Trends in the Law of Remote Practice

Speakers



RUTH A. MATTSO**N, Esq.**, a partner at Vacovec, Mayotte & Singer in Newton, concentrates her practice in the areas of international and multinational estate planning and taxation. Ruth is a lecturer at Boston University School of Law's Graduate Tax Program and frequently speaks on topics related to estate planning and U.S. taxation. She is a Fellow of the American College of Trust and Estate Counsel and a member of several estate planning and tax organizations, including the Boston Estate Planning Council, the Society of Trust and Estate Practitioners, and the Massachusetts Bar Association's Tax Council. Ruth is admitted to practice law in Massachusetts and Pennsylvania. She is a graduate of Boston University School of Law (LLM in Taxation) and Temple University Beasley School of Law.



DANIELLE G. VAN ESS, Esq. founded DGVE law, LLC, a boutique trusts and estates law firm on Boston's South Shore, embracing and harnessing paperless and remote working technology from the firm's inception in 2008. Attorney Van Ess is a 1998 graduate of The George Washington University in Washington, D.C. and a 2001 graduate of Boston University School of Law. She serves on the Boards of Directors of the Massachusetts Forum of Estate Planning Attorneys, and of the Hingham Cemetery where she had to eulogize and bury her little brother in the middle of the COVID-19 surge in late April 2020, before beginning his estate administration remotely back to his home in Florida.

Attorney Van Ess and her law school classmate husband, who is Assistant General Counsel of a large, multinational corporation, are both working full time from home and from the DGVE law® offices in Hingham Square while parenting their four daughters, currently ages 7, 11, 14, & 16, who are learning remotely.

Dates & Location

LIVE WEBCAST

Monday, January 25, 2021
11:00 am–12:00 noon

Register at www.mcle.org
Program Number: 2210330WBC

RECORDED WEBCAST

Monday, February 8, 2021
11:00 am–12:00 noon

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RECORDED WEBCAST

Monday, February 15, 2021
12:00 noon–1:00 pm

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