



CURRENT ISSUES IN

# South Carolina Probate

Learn How to More Effectively Probate  
an Estate While Keeping Up-to-Date on the Latest  
Legislative Changes

Featuring Amy L. Brewer, Sarah Linley Clingman  
and Angela M. Kirby

Charleston

Friday, December 9, 2005

Columbia

Thursday, December 15, 2005

SC Attorneys: 6.0 credits including 1.0 ethics  
SC CPAs/Accountants: 6.0 credits

PROFESSIONAL EDUCATION SYSTEMS INSTITUTE, LLC

# Whether you are new to the probate process, or have probated estates for years, this seminar is for you.

Learn how to move effectively through the probate process, while learning about recent changes in South Carolina statutes and a case law update. When you attend this practical, one-day seminar, you'll:

- **Discuss** how to open, administer and close an estate
- **Learn** about complex estate planning issues such as second marriages and planning for children with special needs
- **Identify** issues such as electing against a will and will contests
- **Be able to** open, administer and close guardianships and conservatorships
- **Discuss** ethical issues in probate
- **Analyze** probate litigation strategies
- **Learn** about the most recent developments and legislation in South Carolina probate

At this program you will receive up-to-date, practical information in a format designed to maximize your time, while allowing plenty of time for questions and answers.

## WHO SHOULD ATTEND

This is a basic-intermediate level program for attorneys, legal assistants and CPAs/Accountants. Others involved in the probate process in South Carolina will also benefit from attending.

## TAKE HOME A VALUABLE RESOURCE:

*Current Issues in South Carolina Probate* (PESI ©2005) is written by the program faculty specifically for this seminar. It is a comprehensive manual that will provide you with continuing reference to estate planning/probate issues. One copy is included with registration.

## IF YOU'RE INVOLVED WITH THE PROBATE PROCESS, DON'T MISS THIS SEMINAR!

Mail in the registration form, fax it to 800-582-8456, call one of our friendly customer service representatives at **800-826-7155** or register online at **[www.pesi.com](http://www.pesi.com)**.

# Seminar Outline

## **Estate Planning Situations that Invite Probate Problems**

- Second Marriages Where There Are Adult Children from Each Marriage
- Planning for Children with Special Needs and Spendthrifts
- Use of Revocable and Irrevocable Trusts Including Nonprobate Assets in the Plan

## **Probate Procedures in Testate and Intestate Situations**

- Procedure for Opening the Estate
- Will Unavailable or Lost
- Ancillary Administration
- Informal vs. Formal Proceedings
- Duties and Conduct of the Personal Representative
- Drafting the Inventory and Accountings
- Closing the Estate

## **Guardianships and Conservatorships**

- Procedure for initiating
- Choosing the Right Person to Serve
- Appointment of GAL, Visitor and Examiners
- Requirements After Appointment
- Termination

## **Alternative Planning for Disability**

- Use of Powers of Attorney
- Use of Trusts

## **Probate Litigation**

- Will Contests
- Claiming the Elective Share
- Family Disagreements

## **Ethics** *(60 minutes of ethics)*

- Who Does the Attorney Represent and in What Capacity?
- Conflicts of Interest
- Representing a Fiduciary
- Attorney's Fees

# Your Knowledgeable Faculty

**Amy L. Brewer** serves as probate paralegal for the Clingman Law Firm, working with attorneys Sarah L. Clingman and Amy M. Landers. She began her career with the Richland County Probate Court. Under the direction of Judge Amy W. McCulloch and Associate Judge Angela Kirby, Ms. Brewer gained knowledge and experience in the field of probate and elder law. She was promoted to be the director of the Guardianship and Conservatorship Department of the probate court. Ms. Brewer received a BA from the University of South Carolina in 2005. While pursuing her degree she worked part time with the Richland County Probate Court.

**Sarah Linley Clingman** is in private practice as the Law Offices of Sarah L. Clingman. Her areas of practice are elder law, estate planning, probate and trusts, real estate and business formation issues. Previously, she worked for the New York law firm of Lane and Mittendorf in their Washington, DC, office, where she represented the University of South Carolina and worked with the energy section of the firm. Ms. Clingman has worked with small and solo practices in Charleston and Beaufort, South Carolina, where she developed a substantial elder clientele. From 1997 to 1999 she was an advising attorney to state boards of licensure and registration, including the South Carolina Board of Long Term Care Administrators and the South Carolina Real Estate Commission. Ms. Clingman is a member of the National Academy of Elder Law Attorneys, the South Carolina Bar, and the Maryland State and American (Task Force on the Legal Needs of the Elderly) bar associations. She received a BA in history from Columbia College, and her master's degree in history and her JD from the University of South Carolina (Kenin Fellowship).

**Angela M. Kirby** is a partner with the law firm of McAngus Goudelock & Courie and is developing the new Estate Planning and Probate Division for the firm. Her practice focuses primarily on estate planning; probate administration and litigation; trust administration and litigation; estate, gift and fiduciary income taxes; corporate and business law; captive insurance law and elder law. She has been a certified public accountant since 1990 and formerly worked for KPMG Peat Marwick in auditing and tax in Greenville, South Carolina. Ms. Kirby was the associate probate judge for Richland County from 1999 to mid-2004 and a former member of the South Carolina Probate Judges Association. While serving as probate judge, she was also an adjunct professor for the paralegal program at Midlands Technical College. Ms. Kirby is a member of the South Carolina and Richland County bar associations, South Carolina Association of Certified Public Accountants, and Richland County Estate Planning Council. She also does pro-bono work for Hospice and Animal Mission. Ms. Kirby graduated cum laude from the College of Charleston with a BS in business administration in 1986 and graduated with honors from Clemson University with an MS in accounting in 1987. She received her JD from the University of South Carolina in 1993.

## REGISTRATION INFORMATION

### Charleston • December 9, 2005

Sheraton North Charleston  
4770 Goer Drive

### Columbia • December 15, 2005

Clarion Town House Hotel  
1615 Gervais Street

#### Seminar Schedule:

8:00 Check-in or register  
8:30 Seminar begins  
11:45-1:15 Lunch (*on your own*)  
4:30 Seminar ends

#### PESI's No-Risk Guarantee:

If you are not satisfied with this seminar, we don't want your money! Call or write us for a full tuition refund. All we ask is that we hear directly from the attendee.

*"Your satisfaction is our goal . . .  
and our guarantee!"*

*Mark Helland*  
Mark Helland, President

#### Tuition Includes:

A full-day, quality seminar from America's premier provider of continuing education; the *Current Issues in South Carolina Probate* manual; and complimentary morning and afternoon refreshment breaks.

**Standard: \$249** per person

**Group: \$229** per person for 2 or more preregistering at the same time. Please staple duplicate forms. Group rate does not apply to walk-ins

**Paralegals: \$199** per person

*Please do not use cell phones in the meeting room or record this seminar. Thank you.*

**Cancellation Policy:** If you contact us before the day of the seminar, you may receive a tuition refund less a \$20 service charge, the materials or a certificate to attend another PESI seminar. On or after the seminar date, you may receive the materials or certificate only. Products will be available 4 weeks after the last seminar date. Please contact PESI at 800-826-7155 for more information.

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If you are registering within one week of seminar, please call 800-826-7155, Monday-Friday 8-5 CT, or e-mail us at [customerservice@pesi.com](mailto:customerservice@pesi.com) for space availability. Walk-ins are welcome with payment at the door but admission cannot be guaranteed.



## CURRENT ISSUES IN SOUTH CAROLINA PROBATE

**Check location:**

- Charleston, Dec. 9, 2005 008323-CHR
- Columbia, Dec. 15, 2005 008323-COL



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**PRODUCT ORDERS**

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