

Friday, January 19, 2024

2 – 5:15 p.m.

Probate, Estate Planning & Trust Section

3.0 MCLE Credit Hours, including 3.0 Probate and Estate Planning Specialization credit hours

Supreme Court Commission on CLE Course #: 240030

Room Location: Willow

Probate, Estate & Trust

This year's PET section CLE promises to have something for everyone. We will hear from Ed Walters, CEO of Fastcase, about the rapidly changing technology of artificial intelligence and how it is already impacting estate planning and probate practice. Ed will then be joined by a panel of South Carolina practitioners to facilitate an audience discussion about the future of our practice area and how we can adapt. Meagan MacBean will follow with a discussion about irrevocable trusts and available options for practitioners to change them. Last but not least, PET Section Chair Billy Newsome and Chair-elect Jonathan Spitz will review the top questions from the PET list serve in 2023.

Agenda

- 2 – 3 p.m. **Tips for the Naturally Intelligent Lawyer in an Artificially Intelligent World**
- Ed Walters
Fastcase
Washington, DC
- 3 – 3:30 p.m. **Panel Discussion on AI & Chat GPT and Their Impact on Estate Planning and Probate Practice in South Carolina**
- Ed Walters
Fastcase
Washington, DC
- Michael J. Polk
Belser & Belser, P.A.
Columbia, SC
- Jonathan E. Spitz
Todd & Johnson, LLP
Columbia, SC
- Andrew D. Merline
Merline & Meacham, P.A.
Greenville, SC
- 3:30 – 3:45 p.m. **Break**

3:45 – 4:30 p.m.

**What Exactly Do You Mean by “Irrevocable?” Decanting,
Modification & Other Things You Need to Know About “Irrevocable”
Trusts**

Meagan MacBean
Newsome Law, P.A.
Columbia, SC

4:30 – 5:15 p.m.

Select Questions from the PET List Serve

William G. Newsome, III
Newsome Law, P.A.
Columbia, SC

Jonathan E. Spitz
Todd & Johnson, LLP
Columbia, SC

Course Planner/Moderator:

William G. Newsome, III
Newsome Law, P.A.
Columbia, SC