

Settlement Wellness™

Planning for an Optimal Personal Injury/Wrongful Death Settlement

Featuring Karen D. Meyers, MBA/JD, CLU, CPCU, FLMI, CSSC, KD Meyers & Associates and Chief Magistrate Paul D. Rattermann, Hamilton County Probate Court

Thursday, November 2, 2006

1:00 to 3:30 p.m.

2.5 Hours CLE Credit

Location

The Cincinnati Bar Center
225 East Sixth Street, Fifth Floor
Cincinnati, Ohio 45202-3209



Cincinnati Bar Association

About the Program

This program will give experienced and new practitioners a framework for settling personal injury claims in an optimal fashion by establishing a framework, which is a unique blend of formal and informal procedure, tax, and client strategy technique. Probate and employment attorneys, as well as those handling insurance claims from a plaintiff and defense perspective, will also benefit from some of the strategies that will be discussed. Specific forms and suggestions will be provided that take a personal injury case, or a case with a personal injury component, from intake through any required probate hearings and approval.

Don't miss the opportunity to learn how to avoid the perils and pitfalls of settlor's remorse and legal malpractice, as well as to learn more about proper planning for probate court approvals.

Program Overview

- Sobering Statistics on Malpractice
- Planning for the End at the Beginning
- Developing A Proactive Prevention Strategy
- Avoiding Settlor's Remorse
- Intake
- Subrogation
 - i. *Sereboff*
 - ii. *Ahlborn*
 - iii. Medicare
 - iv. Private Pays
- Expert Assistance
 - i. Government Benefits
 - 1. Special Needs Trusts
 - ii. Structured Settlements
- Expectation Management
- Claim Avoidance Strategies
- Complaint Drafting
 - i. Tax Planning
 - ii. Recovery Planning
- Mediation Agreements
- Settlement Agreements
- IRS Takes a Stand
- The Potential Implications of Murphy
- Themes in Cases
- Planning for Probate