

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*