

# Planning for Unmarried Couples LGBT and Others

WED SEPT 18, 2019 | 8:00-10:00 A.M.\*

\*8:00 A.M. Free Breakfast by SAGE | 8:30 A.M. CLE

SAGE Edie Windsor Center | 305 7<sup>th</sup> Ave., 15<sup>th</sup> Fl., NYC

**1.5 CLE Credits** in Diversity, Inclusion, and Elimination of Bias  
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## **Planning for Unmarried Couples – LGBT and Others**

*CLE Program presented by the LGBT Bar Association of New York (LeGaL)*

**Wednesday, September 18, 2019 | 8:30-10:00 a.m. | SAGE Edie Windsor Center**

### **AGENDA**

- 8:00 – 8:30 a.m.** Registration and breakfast provided by SAGE
- 8:30 – 8:40 a.m.** Welcome from **Jerry Chasen**, Director of Legacy Planning at SAGE
- 8:40 – 8:45 a.m.** Introduction of panel and overview of presentation (**Sciacca**)
- 8:45 – 9:20 a.m.** **Planning considerations.** What advanced directives are essential for unmarried couples? Should unmarried couples have Wills? Is probate avoidance important? What concerns face unmarried couples when naming beneficiaries on retirement accounts? How does the estate tax affect the unmarried couple? What should unmarried couples consider when planning for long-term care expenses? How does Medicaid and Social Security affect unmarried couples? (**Carmody**)
- 9:20 – 9:50 a.m.** **Post-mortem issues.** What rights do unmarried couples have to direct the disposition of each other's remains? How do simple probate avoidance tips like joint bank accounts affect the unmarried couple? What rights does the surviving member of an unmarried couple have when someone dies intestate? How do children born to an unmarried couple prove kinship? What rights does the surviving member of an unmarried couple have or lose in a probate contest? How does the law treat an unmarried couple in compromise proceedings (wrongful death and conscious pain and suffering)? (**Jones**)
- 9:50 – 10:00 a.m.** Questions and answers (**panel**)

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### **SPEAKER BIOGRAPHIES**

**MATTHEW CARMODY, ESQ.** is a senior associate at Brian A. Raphan P.C., practicing in elder law as well as trust and estates for over ten years. He graduated from CUNY Law School with a concentration in Health Law, and worked at the South Brooklyn Legal Services and Housing Works Client Legal Services serving low income clients with HIV, or at risk of HIV infection. Currently, Matthew runs a legal clinic at SAGE once a month, and has previously assisted transgender organization such as the Sylvia Rivera Law Project and the Trans Justice Funding Project. Matthew has received multiple guardianship and guardianship related appointment from the New York State Supreme Court.

**MEREDITH R. JONES, ESQ.** is a Court Attorney-Referee for the Honorable Harriet L. Thompson in the Kings County Surrogate's Court Kings. Prior to service in this court, she engaged in private practice with the law firm of Alter & Barbaro, Esqs. where she represented clients in a wide range of issues from real estate and landlord/tenant matters to matrimonial and personal injury litigation. At the same time, she served as Deputy Counsel for a State Senator where she provided advice and direction to constituents and lectured in the community regarding legal issues. Ms. Jones is a graduate of Cornell University where she received her B.A. in History and her J.D. from Cornell Law School. She is admitted to practice law in the states of New York and New Jersey. In addition to her work as Court Attorney-Referee in the Surrogate's Court, she also lectures in the community regarding trusts and estates issues.

**THOMAS SCIACCA, ESQ.** is the Principal of Law Offices of Thomas Sciacca, PLLC, where, since 2007 he has focused his practice on Trusts & Estates, Estate Administration, Surrogate's Court Litigation, and Guardianship. In addition, Mr. Sciacca is an Adjunct Assistant Professor at New York University's School of Professional Studies, an appointment he has held since January 2006. Mr. Sciacca is a frequent speaker on various topics related to his various areas of practice. Mr. Sciacca is a graduate of New York University School of Law (LLM – taxation), Pace University School of Law (JD), and the University at Albany, State University of New York (BA). He is licensed to practice law in New York, New Jersey, Florida, the Southern District, and the United States Tax Court.