



15
YEARS

**FEERICK CENTER
FOR SOCIAL JUSTICE**

COVID-19 RESPONSE PROJECT (CRP)



Present

**Remote Pro Bono Estate Planning
Wills and Powers of Attorney**

Thursday, April 7, 2022

2:30 p.m. – 5:00 p.m.

Fordham Law School | CLE Program

via Zoom Webinar

AGENDA

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Remote Pro Bono Estate Planning: Wills and Powers of Attorney

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TIMED AGENDA

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| 2:30 p.m. – 2:45 p.m.
<i>15 minutes</i> | Introductions – <i>Dora Galacatos and Kelly McGovern</i>
Program Overview – <i>Teresa McNamara</i> |
| 2:45 p.m. – 3:10 p.m.
<i>25 minutes, 0.5 Ethics and Professionalism Credits</i> | Ethical Issues for Legal Services – <i>Randye Retkin</i> |
| 3:10 p.m. – 4:00 p.m.
<i>50 minutes, 1.0 Professional Practice Credit</i> | Assessment of Client Needs – <i>Teresa McNamara and Gavin Reynolds</i>
Will Preparation and Follow-Up – <i>Gavin Reynolds and Beth Schwartz</i> |
| 4:00 p.m. – 4:50 p.m.
<i>50 minutes, 1.0 Professional Practice Credit</i> | Drafting Powers of Attorney – <i>Jeffrey P. Nieznanski</i> |
| 4:50 p.m. – 5:00 p.m.
<i>10 minutes</i> | Questions and Answers |

Biographies of Presenters

Moderators:

Dora Galacatos, Esq., the Executive Director to the Feerick Center for Social Justice, is a Fordham Law alumna (1996), with experience working in city government, the not-for-profit sector, and legal services. Prior to coming to Law School, Dora worked for the New York City Department of Juvenile Justice and the New York City for Mayor's Office of Drug Abuse Policy from 1989 to 1993, where she focused on program development, program evaluation, and policy analysis. As part of a Skadden Fellowship (1997-98), Dora helped establish a family day care network at Northern Manhattan Improvement Corporation, in Washington Heights, Manhattan. Dora had served as Staff Director to the New York City Family Homelessness Special Master Panel, working alongside former Fordham Law School dean, Professor John D. Feerick. Dora also served as a law clerk to the late-Honorable Milton Pollack (1996-97) and to the Honorable Paul A. Crotty (2005-2006), both District Judges in the Southern District of New York. Dora is a graduate of the University of Pennsylvania, where she received her Bachelor of Arts in History (1987), and the New School for Social Research, where she was a Jacob M. Kaplan Fellow and received a Master of Science in Urban Policy (1993). In 2009, Dora was honored by The New York County Lawyers Association with their Public Service Award. In 2011, Manhattan Legal Services awarded her its Medal of Honor. In 2013, MFY Legal Services, Inc. recognized Dora with its Partner in Justice Award. Dora is a former chair of the New York City Bar Civil Court Committee and currently serves on the Board of Directors of Terra Firm.

Kelly McGovern, Esq., is the Director of Pro Bono Affairs at Legal Assistance of Western New York, Inc.® (LawNY), where she manages pro bono initiatives and opportunities, internship programs, and volunteer engagement across LawNY's fourteen counties. Kelly graduated from Hobart and William Smith Colleges in 2003 with a Political Science degree. She received her JD from Syracuse University School of Law with a Concentration in Global Law and Policy in 2006, and was admitted to practice in New York State in 2007. Kelly was previously a LawNY Staff Attorney, and she handled primarily public benefits and eviction prevention cases. She represented clients at unemployment insurance benefits and other administrative hearings for 13 years, and continues to supervise LawNY staff members who practice in this substantive legal area. Kelly has also convened LawNY work groups focused on employment law, regional pro bono work, and assisting limited English proficient clients. Kelly serves on the New York State Bar Association's Committee on Legal Aid, the 6th and 8th Judicial Districts' Pro Bono Committees, and the New York State Chief Judge's Attorney Emeritus Advisory Council. She is also the co-chair of the Pro Bono Coordinators' Network meeting and is on the Steering Committee for the New York State Bar Association's 2022 Partnership Conference. Kelly works closely with pro bono attorneys, legal services providers, and academic institutions on pro bono matters.

Speakers:

Teresa McNamara, Esq., is the Attorney Pro Bono Coordinator of External Affairs at Legal Assistance of Western New York, Inc.® (LawNY). Prior to joining LawNY as a full-time employee, Teresa volunteered for 2 years as a pro bono attorney for the organization, assisting clients with uncontested divorces, estate planning, and legal name changes. In 2018, Teresa received the President's Pro Bono Service Award for the 6th Judicial District from the New York State Bar Association and was recognized by the Finger Lakes Women's Bar Association for outstanding pro bono service. Teresa received her JD from Syracuse University School of Law with a Concentration in Family Law in 2007 and was admitted to practice in New York State in 2011. Teresa is the President of the Tompkins County Bar Association and a past CLE Chair and Treasurer to the Finger Lakes Women's Bar Association and serves on the Tompkins County Access to Justice Committee.

Jeffrey P. Nieznanski, Esq., has been employed by Legal Assistance of Western New York, Inc.® since 2007. Starting as a staff attorney with LawNY® in Bath, NY, he handled employment, disability, and education law cases for clients in Steuben and Allegany counties, prior to moving back to Rochester, NY in 2012. A graduate of Albany Law School and the National Labor College, he was a labor union representative in Rochester, NY and Washington, DC prior to joining LawNY. Since joining LawNY, he has filed a wage theft case that resulted in 15 employees recovering over \$300,000 in damages. As a supervising attorney in Rochester, Jeff supervises attorneys working on behalf of children with special education needs, seniors, crime victims, and elder abuse victims. Jeff also provides direct legal representation to Monroe County Seniors, and initiated a Seniors Legal Information Line for Monroe County residents in 2018. Jeff co-chairs the Monroe County Bar Association's Elder Law Committee, and is an original member of the Monroe County Enhanced Multi-Disciplinary Team. The Monroe County E-MDT is comprised of professionals from various disciplines and has focused on investigation, intervention, and prevention of financial exploitation of older adults since 2012. Jeff was admitted to practice in New York State Courts in 2007 and in the United States District Court Western District of New York in 2010. Jeff is a member of the New York State Bar Association, the Monroe County Bar Association, and the National Lawyers Guild.

Randy Retkin, Esq., is the Director and Founder of LegalHealth, a Division of the New York Legal Assistance Group (NYLAG). LegalHealth is the country's largest medical-legal partnership. Prior to joining NYLAG, Ms. Retkin served as Director of Legal Services for the Gay Men's Health Crisis, the nation's oldest and largest organization serving people with HIV/AIDS. Ms. Retkin served as a staff attorney with New York Lawyers for the Public Interest and Volunteers of Legal Service (VOLS) where she established the VOLS Immigrants' Rights Project. She is a founder of the New York Immigration Coalition and the National Cancer Legal Services Network. She is a co-author of New York States' Standby Guardianship law and helped spearhead the expansion of the law to assist immigrant families. She is also an author of

New York's States Health-Related Legal Services law. Ms. Retkin is a former member of the OneCityHealth Executive Committee and the New York City Bar Association Ethics Committee and is a frequent presenter on Ethics.

Gavin Reynolds, Esq., is a Supervising Attorney with Legal Assistance of Western New York, Inc., having joined the agency in 2014. LawNY provides free legal aid to people with civil legal problems in Western New York, across 14 counties in seven offices. Gavin is based in LawNY's Geneva office. Gavin's primary focus for the past 8 years has been in the realm of elder law, advocating for clients over the age of 60. In addition to helping older individuals with a variety legal matters, Gavin also has handled and supervised cases in many of LawNY's core practice areas, including housing, public benefits, and LGBTQ+ advocacy. Gavin also has previously served as the Managing Attorney of the Geneva office. Currently, Gavin is back focusing on client-centered advocacy as the Supervisor of Geneva's elder law unit. Prior to joining LawNY, Mr. Reynolds was a litigation and family wealth planning associate with a large private law firm in Rochester, NY. He is a 2008 graduate of Fordham University School of Law.

Beth Schwartz, Esq., was a full time professor at Fordham Law School from 1987 through 2021, teaching a variety of in-house clinics, including the Litigation Skills Clinic, Children's Disability Clinic, Family Advocacy Clinic, and Mediation Clinic. In addition, Beth served as the Faculty Director of Fordham's Fundamental Lawyering Skills Program, Externship Program and Pro Bono Scholars Program. In July 2021, Beth retired from Fordham Law School and began performing pro bono legal work with New York's Attorney Emeritus Program. She currently volunteers with the City Bar Justice Center's Federal Pro Se Legal Assistance Project and with LawNY. Beth is also a volunteer dog walker with PAWS NY, a New York City non-profit dedicated to keeping pets in their homes.