

Graf & Stiebel Teach Estate Planning and Much More in Class Presented by CBA Estate Planning & Probate Committee

By Dimity V. Orlet, CLE Director and Assistant Counsel

A robust group of estate-planning attorneys gathered at Nicholson's Pub on a May evening to celebrate the completion of a journey that had begun 18 weeks earlier. Since that day, the group of 37 attorneys had met at the CBA every Monday to study advanced concepts in estate planning in a class ably led by attorneys Bill Graf and Mark Stiebel, both of Graf & Stiebel, and presented by the CBA's Estate Planning & Probate Committee.



Graf

Stiebel

The class, officially known as the "Estate Planning and Drafting Series," was first offered by Bill Graf and Mike Moyers in 2006, with enrollment limited to 27 attorneys. The class was designed much like a graduate level program. An ambitious syllabus and reading list were established and weekly homework, including detailed drafting assignments, were required. In teaching this class, Graf, Moyers, and Stiebel, sought to raise the bar for estate-planning practitioners. They also shared the lofty, but simple, goal of making Cincinnati the home of the best in the estate-planning field.

Given the significant commitment of time and energy the class would require, Graf and I initially wondered whether we would fill *any* of the seats. But, our concerns quickly evaporated when the class reached full capacity before the brochures promoting the program had even reached mailboxes. In fact, a waiting list of more than 10 attorneys quickly developed. When enrollment opened for the 2008 class, response was again strong, with many attorneys vying for a seat in the class based on the praise they had heard from their colleagues who had participated in the 2006 class. Given the demand, Graf and Stiebel enlarged the class size to allow 37 attorneys to participate.

"The class was nothing short of outstanding..."

In watching both the 2006 and the 2008 classes progress, I was struck by the fact that the attorneys were gaining more than just advanced knowledge of estate planning strategies – believe me, they learned plenty of that too! But it was obvious that they were also enjoying getting to know each other better, both personally and professionally. And, they were benefiting from their discussions of shared challenges and frustrations. As a result, they were developing a unique community that could serve as a future network for discussion and support. It is my hope and belief that through forging these relationships, just as by sharpening their skills, these attorneys will find more enjoyment and success in their practices.

So, as it turns out, in their generous and tireless devotion of time and energy (all provided on a volunteer basis), Graf and Stiebel have achieved their lofty goal of raising the bar for estate-planning practitioners in Cincinnati. And perhaps just as importantly, they have positively impacted over 60 attorneys' enjoyment of their work. Graf and Stiebel are shining examples of the wonderful attorneys who share their talents with the CBA and their peers. I hope you will join me in admiring and appreciating their work, as well as the support of the Estate Planning & Probate Committee.

Praise from Participants

"The class was nothing short of outstanding. The subject matter was extensive and exceptionally well taught. I was very impressed with Bill and Mark's ability to break down very complex legal issues to make them understandable and to relate them to real-life situations. I am very appreciative of the time they devoted to making this class possible and am certain that it will enhance the quality of my practice immensely."

"Captains Graf and Stiebel have boldly taken us on a voyage to the outer limits of tax and estate planning."

"Mark and Bill have gone above and beyond the call of duty to make sure that each topic is covered thoroughly. Not only do they take questions; they sometimes even follow up after class. It takes a very high level of commitment on their part to spend the time and effort that is required to put on a class of this quality and magnitude and to do so at the expense of their families and practices. We are all very lucky to have them!"

"In my 26 years of attending CLE courses, this has been the most informative, bar none. While the workload is demanding, the benefits are immense. Bill and Mark were able to take a very complicated and sometimes dry topic and make it understandable, interesting and even fun. My hat is off to them."