

CURRICULUM VITAE

S. Alan Medlin

David W. Robinson Chair (2003-present)
Full Professor (1994-present)
Associate Professor (1989-94)
Assistant Professor (1984-89)

Courses taught: Trusts and Estates
Fiduciary Administration
Fundamental of Law Practice and Professionalism
Professional Responsibility
Advanced Professional Responsibility
Property
Real Estate Finance
Real Estate Transactions I and II
Wills, Trusts, and Estates
Law Practice Workshop

Accomplishments:

Reporter, South Carolina Uniform Power of Attorney Act (2014-2015)

Reporter, South Carolina Probate Code Amendments (2009-2013)

USC Law School Outstanding Teacher Award (2011)

Treat Award Winner, National College of Probate Judges 2004

Reporter, South Carolina Trust Code (2004-2005)

ABA Real Property, Probate and Trust Section Advisory Board (2004-2006)

USC Law School Outstanding Teacher Award (2003)

Resident Editor, ABA REAL PROPERTY, PROBATE AND TRUST JOURNAL
(1999-2002)

USC School of Law G.G. Dowling Faculty Award (2002)

Honorary Member, South Carolina Association of Probate Judges (2000-present)

Board Member: Center for the Law, Legal Profession and Public Policy (1993-1998)

USC Committee on Tenure and Promotion (1996-1997)

USC Law School Faculty Service Award (1996)

Compleat Lawyer Award (1994)

USC Law School Outstanding Teacher Award (1993)

USC Law School Outstanding Teacher Award (1992)

Editor, ABA REAL PROPERTY, PROBATE AND TRUST JOURNAL (1990-1993)

Editor (with Boyle & Zaritsky), PROBATE PRACTICE REPORTER (1989-present)

Instructor, South Carolina Bar Review, "Wills and Trusts" (1989-2000)

Editor (with Boyle), ESTATE PLANNING, PROBATE AND TRUST NEWS, (1988-2000)

Member: Advisory Board - MUSC Estate Planning Institute (1994 - 1999)

Academic Fellow: American College of Trust and Estate Counsel (1991-present)

Member of Board Governing Certified Specialists in Estate Planning and Probate (South Carolina) (1992-1994); Chair (1994)

Member, Board of Directors, USC Development Foundation (1991-present); President (1991)

Reporter and Draftsman: 1990 South Carolina Probate Code Amendments

Associate Editor, ABA REAL PROPERTY, PROBATE AND TRUST JOURNAL (1988-89)

Chairman, University Academic Responsibility Committee (1989-90)

USC Law School Faculty Service Award (1989)

Articles Editor, PROBATE AND PROPERTY, THE MAGAZINE OF THE REAL PROPERTY, PROBATE AND TRUST SECTION OF THE AMERICAN BAR ASSOCIATION (1987-88)

Co-draftsman: 1988 South Carolina Probate Code Amendments

USC Law School Outstanding Teacher Award (1988)

Associate Editor, PROBATE AND PROPERTY, THE MAGAZINE OF THE REAL PROPERTY, PROBATE AND TRUST SECTION OF THE AMERICAN BAR ASSOCIATION (1986-87)

Legislative liaison, draftsman, and reporter: 1987 South Carolina Probate Code Amendments

USC Law School Outstanding Teacher Award (1986)

USC Law School Outstanding Teacher Award (1985)

USC Faculty Senator (1985-88)

Bar Membership:

South Carolina Bar (Certified Specialist in Estate Planning and Probate)
American Bar Association
Fourth Circuit Judicial Conference

Law
Publications:

Issues 1 through 320 (as of July 2015) of the PROBATE PRACTICE REPORTER, co-author (with Zaritsky) and co-editor (with Boyle and Zaritsky)

PROBATE PRACTICE REPORTER, *Elvis is Still in the Building – That Is, The Courthouse Building*, Vol. 27, No. 5

The South Carolina Probate Code Patched and Refurbished: Version 2013, 65 S.C. L. Rev. 81 (2013)

PROBATE PRACTICE REPORTER, *A Review of Drafter Malpractice*, Vol. 26, No. 12

PROBATE PRACTICE REPORTER, *Environmental Liability Update: Concerns for Beneficiaries Remain*, Vol. 26, No. 9

PROBATE PRACTICE REPORTER, *Claims-Barring Due Process Concerns*, Vol. 26, No. 8

PROBATE PRACTICE REPORTER, *Revoking Inter Vivos Trusts By Will*, Vol. 26, No. 5 (2014)

PROBATE PRACTICE REPORTER, *A Roadmap for Fiduciary Prudence*, Vol. 26, No. 2 (2014).

PROBATE PRACTICE REPORTER, *More Disclaimer Malpractice Worries*, Vol. 25, No. 11 (2013).

PROBATE PRACTICE REPORTER, *Life Insurance Beneficiary Designation Can Cause Family Feud*, Vol. 25, No. 10 (2013).

PROBATE PRACTICE REPORTER, *The United States Supreme Court Addresses Social Security Eligibility for Posthumous Children*, Vol. 24, No. 6 (2012).

PROBATE PRACTICE REPORTER, *Personal Representative Personally Liable for Additional State Estate Tax*, Vol. 24, No. 5 (2012).

PROBATE PRACTICE REPORTER, *Retroactivity of Statutory Codes*, Vol. 24, No. 2 (2012).

PROBATE PRACTICE REPORTER, *The Transfer on Death Real Estate Deed: Boon or Bane?*, Vol. 23, No. 3 (2011)

REAL PROPERTY, TRUST AND ESTATE LAW JOURNAL, 2010: *It Was a Very Good Year to Die--or Was It?*, Winter 2011 (with Boyle and Zaritsky)

ACTEC LAW JOURNAL, *Construing Wills and Trusts During the Estate Tax Hiatus in 2010*, Fall 2010 (with Boyle and Zaritsky)

PROBATE PRACTICE REPORTER, *Family Settlements Another Possible Hiatus Construction Solution*, Vol. 22, No. 11 (2010) (with Boyle and Zaritsky)

PROBATE PRACTICE REPORTER, *The 2010 Hiatus Problems: Disclaimers a Possible Solution?*, Vol. 22, No. 10 (2010) (with Boyle and Zaritsky)

SOUTH CAROLINA LAWYER, *Construing Wills and Trusts During the Estate Tax Hiatus in 2010*, September 2010 (with Boyle and Zaritsky)

PROBATE PRACTICE REPORTER, *Construing Wills and Trusts During the Hiatus*, Vol. 22, No. 3 (2010) (with Boyle and Zaritsky)

PROBATE PRACTICE REPORTER, *Fiduciary Issues for Artists and Entertainers*, Vol. 21, No. 9 (2009)

PROBATE PRACTICE REPORTER, *Marshalling Assets or Making a Claim: It Makes a Difference*, Vol. 21, No. 8 (2009)

PROBATE PRACTICE REPORTER, *No Attorney Duty of Care for Failure to Execute Will*, Vol. 21, No. 5 (2009)

PROBATE PRACTICE REPORTER, *Trustee Warnings About ILITs*, Vol. 21, No. 4 (2009)

PROBATE PRACTICE REPORTER, *Potential Fiduciary Liability for Choosing Probate Counsel?*, Vol. 20, No. 12 (2008)

PROBATE PRACTICE REPORTER, *Pet Trusts: Creation and Enforcement*, Vol. 20, No. 9 (2008)

PROBATE PRACTICE REPORTER, *FLP Discounts in Elective Share Cases*, Vol.20, No. 7 (2008)

PROBATE PRACTICE REPORTER, *Even a Single Word Can Affect the Construction of a Trust,*” Vol.20, No. 6 (2008)

Limitations on the Trustee's Power to Adjust, 42 REAL PROP., PROB. & TR. J. 717 (2008)

PROBATE PRACTICE REPORTER, *The Impact of Postmortem Changes in Value on Abatement Issues*, Vol.19, No. 12 (2007)

PROBATE PRACTICE REPORTER, *Posthumously-Conceived Children and Social Security Survivor's Benefits*, Vol.19, No. 11 (2007)

PROBATE PRACTICE REPORTER, *Lifetime Transfer of Savings Bonds*, Vol-.19, No. 4 (2007)

PROBATE PRACTICE REPORTER, *Power to Adjust Limitations*, Vol.19, No. 3 (2007)

PROBATE PRACTICE REPORTER, *A First Look at Statutory Trustee Delegation*, Vol.19, No. 2 (2007)

THE SOUTH CAROLINA TRUST CODE (co-author with Hardin) (SC Bar 2006)

Estate Planning Studies: THE UNIFORM PRINCIPAL AND INCOME ACT'S POWER TO ADJUST (Merrill-Andersen) (2006)

PROBATE PRACTICE REPORTER, *Power to Adjust Pre-Conditions*, Vol.18, No. 12 (2006)

PROBATE PRACTICE REPORTER, *More Ruminations About the Trustee's Power to Adjust*, Vol.18, No. 7 (2006)

PROBATE PRACTICE REPORTER, *The Uniform Principal and Income Act's Power to Adjust*, Vol.18, No. 6 (2006)

PROBATE PRACTICE REPORTER, *The UPC Response to Tulsa: Opportunity for Less Notice?*, Vol.18, No. 3 (2006)

PROBATE PRACTICE REPORTER, *Shades of Tulsa: Another Claims-Barring Due Process Case*, Vol.18, No. 2 (2006)

SOUTH CAROLINA LAWYER, *The S.C. Elective Share Marital Deduction Offset Rule*, Vol 17., No.6, page 12 (May 2006) (with Boyle)

The Impact of Significant Substantive Provisions of the South Carolina Trust Code, 57 S.C. L. Rev. 137 (2005)

PROBATE PRACTICE REPORTER, *The Uniform Trust Code Treatment of Revocable Trusts*, Vol.17, No. 9 (2005)

PROBATE PRACTICE REPORTER, *Beneficiary's Ability to Discover a Trustee's Communications with Counsel*, Vol.17, No. 8 (2005)

PROBATE PRACTICE REPORTER, *Removal of Probate Cases to Federal Court*, Vol.17, No.7 (2005) (with Howard B. Stravitz)

PROBATE PRACTICE REPORTER, *Some Uniform Trust Code Provisions Causing Controversy: Part 2*, Vol.17, No.5 (2005)

PROBATE PRACTICE REPORTER, *Some Uniform Trust Code Provisions Causing Controversy: Part 1*, Vol.17, No.4 (2005)

Estate Planning Studies: Probate Update (Merrill-Andersen) (2005)

PROBATE PRACTICE REPORTER, *Social Security Benefits for Posthumously-Conceived Children*, Vol.16, No.8 (2004)

PROBATE PRACTICE REPORTER, *Choosing the Law Governing Trusts*, Vol.16, No.5 (2004)

Estate Planning Studies: TRUST REFORMATION AND CHARITABLE TRUSTS (Merrill-Andersen) (2004)

PROBATE PRACTICE REPORTER, *Trust Modification and Reformation Under the Uniform Trust Code*, Vol.16, No.4 (2004)

PROBATE PRACTICE REPORTER, *Cy Pres and the Two Charities*, Vol.14, No.10 (2002)

WILLS AND TRUSTS IN SOUTH CAROLINA (SC Bar 2002)

Estate Planning Studies: DISCLAIMERS, SPOUSAL PROTECTION, CONTRACTS TO WILL, AND TAX CONSEQUENCES (Merrill-Andersen) (2002)

PROBATE PRACTICE REPORTER, *The Deadman's Statute and Exceptions*, Vol.13, No.12 (2001)

PROBATE PRACTICE REPORTER, *Double Taxation and Treaties*, Vol.13, No.11 (2001)

PROBATE PRACTICE REPORTER, *Massachusetts Remains a Haven for Trust Reformation*, Vol.13, No.4 (2001)

Estate Planning Studies: TRUST REFORMATION AND TAXATION - (Merrill-Andersen) (2001)

PROBATE PRACTICE REPORTER, *Trustees and Attorney Client Privilege*, Vol.12, No.4 (2000)

PROBATE PRACTICE REPORTER, *Year-End Gifting Reminders* (with Boyle and Zaritsky, Volume 11, No.12 (1999)

PROBATE PRACTICE REPORTER, *Will Preparation Software and Unauthorized Practice*, Volume 11, No.10 (1999)

PROBATE PRACTICE REPORTER, *Can Trustees Enjoy Privileged Communications with Lawyers?* , Volume 11, No.9 (1999)

PROBATE PRACTICE REPORTER, *The Federal Probate Exception and Tortious Interference with an Inheritance*, Vol.11, No.4 (1999)

TRUSTS AND ESTATES (NOV. 1998), *State Law Update: A Smorgasbord of Decisions* (cover article)

PROBATE PRACTICE REPORTER, *Feds Split over Disclaiming Tax Liens*, Vol.10, No.12 (1998)

Estate Planning Studies: CURRENT DEVELOPMENTS IN TRUST AND ESTATE LAW (Merrill-Andersen) (1998)

ESTATE PLANNING, PROBATE AND TRUST NEWS, A NEWSLETTER OF THE ESTATE PLANNING, PROBATE AND TRUST LAW SECTION OF THE SOUTH CAROLINA BAR (Winter 1998), Editor and Author (with Professor Boyle)

Recent Trends in Probate: The Dog Wags Back (Again) – Another Update on Non-tax Issues Affecting the Estate Planning and Probate Practitioner, 32 UNIV. MIAMI ESTATE PLANNING INSTITUTE 200 (Matthew Bender 1998)

ESTATE PLANNING, PROBATE AND TRUST NEWS, A NEWSLETTER OF THE ESTATE PLANNING, PROBATE AND TRUST LAW SECTION OF THE SOUTH CAROLINA BAR (Summer 1998), Editor and Author (with Professor Boyle)

American College of Trust and Estate Counsel, Study 10 (South Carolina Report)

PROBATE PRACTICE REPORTER, *Vicarious Conception and Probate*, Vol-.10, No.5 (1998)

PROBATE PRACTICE REPORTER, *Conspiracy Theories Are in Vogue, Even in Probate*, Vol.10, No.4 (1998)

PROBATE PRACTICE REPORTER, *Proposed New Fiduciary Accounting Rules*, Vol. 10, No. 3 (1998)

PROBATE PRACTICE REPORTER, *Disclaimer Malpractice Worries*, Vol. 9, No. 12 (1997)

PROBATE PRACTICE REPORTER, *Congressional CERCLA Exculpation for Fiduciaries: Silt in the Safe Harbor?*, Vol. 9, No. 6 (1997)

PROBATE PRACTICE REPORTER, *A Vial Story, Or JTROS Accounts at the Cryobank*, Vol.9, No. 3 (1997)

PROBATE PRACTICE REPORTER, *More Claims Confusion*, Vol.9, No. 2 (1-997)

Estate Planning Studies: CERCLA LIABILITY FOR FIDUCIARIES (Merrill-Andersen) (with Professor Boyle) (1997)

ESTATE PLANNING, PROBATE AND TRUST NEWS, A NEWSLETTER OF THE ESTATE PLANNING, PROBATE AND TRUST LAW SECTION OF THE SOUTH CAROLINA BAR (Spring 1997), Editor and Author (with Professor Boyle)

PROBATE PRACTICE REPORTER, *Probate and Powers: Part II*, Vol.8, No. 8 (1996)

ESTATE PLANNING, PROBATE AND TRUST NEWS, A NEWSLETTER OF THE ESTATE PLANNING, PROBATE AND TRUST LAW SECTION OF THE SOUTH CAROLINA BAR (Winter 1996), Editor and Author (with Professor Boyle)

ESTATE PLANNING, PROBATE AND TRUST NEWS, A NEWSLETTER OF THE ESTATE PLANNING, PROBATE AND TRUST LAW SECTION OF THE SOUTH CAROLINA BAR (Spring 1996), Editor and Author (with Professor Boyle)

Estate Planning Studies: Powers of Appointment (Merrill-Andersen) (with Professor Boyle) (1996)

PROBATE PRACTICE REPORTER, *Probate and Powers: Part I*, Vol.8, No. 6 (1996)

PROBATE PRACTICE REPORTER, *Wrongful Death of an Illegitimate Fetus? Can the Father Recover?*, Vol.8, No. 4 (1996)

ESTATE PLANNING, PROBATE AND TRUST NEWS, A NEWSLETTER OF THE ESTATE PLANNING, PROBATE AND TRUST LAW SECTION OF THE SOUTH CAROLINA BAR (Winter 1996), Editor (with Professor Boyle)

PROBATE PRACTICE REPORTER, *How Do Probate Practitioners Charge?*, Vol.7, No. 12 (1995)

PROBATE PRACTICE REPORTER, *Qualifying the Surviving Spouse*, Vol.7, No. 6 (1995)

ESTATE PLANNING, PROBATE AND TRUST NEWS, A NEWSLETTER OF THE ESTATE PLANNING, PROBATE AND TRUST LAW SECTION OF THE SOUTH CAROLINA BAR (1995), Editor and Author (with Professor Boyle)

PROBATE PRACTICE REPORTER, *I've Got a Secret Trust*, Vol.7, No. 1 (1995)

PROBATE PRACTICE REPORTER, *The Omitted Spouse's Share*, Vol.6, No. 10 (1994)

ESTATE PLANNING, PROBATE AND TRUST NEWS, A NEWSLETTER OF THE ESTATE PLANNING, PROBATE AND TRUST LAW SECTION OF THE SOUTH CAROLINA BAR (1994), Editor and Author (with Professor Boyle)

PROBATE PRACTICE REPORTER, *Same-Sex Partners and Probate Practice: Marriage*, Vol.6, No. 4 (1994)

PROBATE PRACTICE REPORTER, *Same-Sex Partners and Probate Practice: Adoption*, Vol.6, No. 3 (1994)

PROBATE PRACTICE REPORTER, *Guaranteed Probate Problems*, Vol.6, No. 1 (1994)

Result-Oriented Interpretations of the South Carolina Probate Code Create Estate of Confusion, 44 S.C.L. REV. 287 (1993)

PROBATE PRACTICE REPORTER, *Sherman Marches Through the Fourth Circuit*, Vol.5, No. 9 (1993)

PROBATE PRACTICE REPORTER, *Trustee Fears of Environmental Liability Rise with Phoenix*, Vol.5, No. 6 (1993)

PROBATE PRACTICE REPORTER, *To Whom Does the Fiduciary's Attorney Owe a Duty?*, Vol.5, No. 4 (1993)

Estate Planning Studies: Current Developments in Trust and Estate Law (Merrill-Andersen) (with Professor Boyle) (1993)

An Examination of Disclaimers Under UPC Section 2-801, 55 ALBANY L. REV. 1233 (1992) (a national symposium on the 1990 Uniform Probate Code amendments)

Recent Trends in Probate, 26 U. MIAMI ESTATE PLANNING INSTITUTE 500 (Matthew-Bender 1992) Chapter 5: *The Dog Wags Back: Recent Developments in Probate Law*

PROBATE PRACTICE REPORTER, *Drafting Malpractice: More Storm Warnings*, Vol.4, No. 11 (1992)

PROBATE PRACTICE REPORTER, *Dirt at Death: Where Is the Title to Real Property?*, Vol.4, No. 9 (1992)

PROBATE PRACTICE REPORTER, *A Heated Dispute Thaws Frozen Embryos*, Vol.4, No. 7 (1992)

ESTATE PLANNING, PROBATE AND TRUST NEWS, A NEWSLETTER OF THE ESTATE PLANNING, PROBATE AND TRUST LAW SECTION OF THE SOUTH CAROLINA BAR (1992), Editor and Author (with Professor Boyle)

Estate Planning Studies: Current Developments in Trust and Estate Law (Merrill-Andersen) (with Professor Boyle) (1992)

PROBATE PRACTICE REPORTER, *Who Is a Natural Object of the Bounty?* (with Tara Nauful), Vol.4, No. 3 (1992)

PROBATE PRACTICE REPORTER, *Joint Editorial Board Rebukes Eighth Circuit Decision*, Vol.4, No. 1 (1992)

PROBATE PRACTICE REPORTER, *Tulsa Professional Collection Services Finally Collects*, Vol.3, No.7 (1991)

PROBATE PRACTICE REPORTER, *Attorney Involvement and Preventive Maintenance*, Vol.3, No.6 (1991)

PROBATE PRACTICE REPORTER, *Planning for Revocation*, Vol.3, No.4 (1991)

PROBATE PRACTICE REPORTER, *Environmental Liability: A Hazard for Fiduciaries?*, Vol.3, No.3 (1991)

PROBATE PRACTICE REPORTER, *The Effects of Ademption and Abatement on Probate*, Vol.3, No.1 (1991)

SOUTH CAROLINA LAWYER, *What Every South Carolina Lawyer Should Know About the (Ugh!) Rule Against Perpetuities*, (with Boyle) May/June 1991.

ESTATE PLANNING, PROBATE AND TRUST NEWS, A NEWSLETTER OF THE ESTATE PLANNING, PROBATE AND TRUST LAW SECTION OF THE SOUTH CAROLINA BAR (Spring 1991), Editor and Author (with Professor Boyle)

Estate Planning Studies: Current Developments in Trust and Estate Law (Merrill-Andersen) (with Professor Boyle) (1990)

ESTATE PLANNING, PROBATE AND TRUST NEWS, A NEWSLETTER OF THE ESTATE PLANNING, PROBATE AND TRUST LAW SECTION OF THE SOUTH CAROLINA BAR (Winter 1990), Editor and Author (with Professor Boyle)

SOUTH CAROLINA LAWYER, *1990 Amendments to the South Carolina Probate Code*, November/December 1990

Deferred Charitable Giving, (with Boyle) (in conjunction with the development of a comprehensive deferred giving program for USC Law School) (1990)

PROBATE PRACTICE REPORTER, *Cruzan Decision Ponders Right to Die*, Vol.2, No.8 (1990)

ESTATE PLANNING, PROBATE AND TRUST NEWS, A NEWSLETTER OF THE ESTATE PLANNING, PROBATE AND TRUST LAW SECTION OF THE SOUTH CAROLINA BAR (Summer 1990), Editor and Author (with Professor Boyle)

PROBATE PRACTICE REPORTER, *Reforming Charitable Trusts*, Vol.2, No. 6 (1990)

ESTATE PLANNING, PROBATE AND TRUST NEWS, A NEWSLETTER OF THE ESTATE PLANNING, PROBATE AND TRUST LAW SECTION OF THE SOUTH CAROLINA BAR (Spring 1990), Editor and Author (with Professor Boyle)

SOUTH CAROLINA LAWYER, *An Overview of the Elective Share*, Vol.1, No.3 (1989)

SOUTH CAROLINA LAWYER, *Settling a Minor Problem*, Vol.1., No.1 (1989)

ESTATE PLANNING, PROBATE AND TRUST NEWS, A NEWSLETTER OF THE ESTATE PLANNING, PROBATE AND TRUST LAW SECTION OF THE SOUTH CAROLINA BAR (Fall 1989), Editor and Author (with Professor Boyle)

PROBATE PRACTICE REPORTER, *Avoiding the Elective Share*, Vol.1, No.11 (1989)

ESTATE PLANNING, PROBATE AND TRUST NEWS, A NEWSLETTER OF THE ESTATE PLANNING, PROBATE AND TRUST LAW SECTION OF THE SOUTH CAROLINA BAR (Summer 1989), Editor and Author (with Professor Boyle)

PROBATE PRACTICE REPORTER, *The Attorney-Beneficiary: Wearing Two Hats Can Cause Headaches*, Vol.1, No.7 (1989)

Estate Planning Studies: Fiduciary Accounting (Merrill-Andersen) (with Professor Boyle) (1989)

ESTATE PLANNING, PROBATE AND TRUST NEWS, A NEWSLETTER OF THE ESTATE PLANNING, PROBATE AND TRUST LAW SECTION OF THE SOUTH CAROLINA BAR (Spring 1989), Editor and Author (with Professor Boyle)

PROBATE PRACTICE REPORTER, *Waiving the Elective Share*, Vol.1, No.4 (1989)

PROBATE PRACTICE REPORTER, *Creditors' Claims: Traps and Problems*, Vol.1, No.1 (1989)

ESTATE PLANNING, PROBATE AND TRUST NEWS, A NEWSLETTER OF THE ESTATE PLANNING, PROBATE AND TRUST LAW SECTION OF THE SOUTH CAROLINA BAR (December 1988), Editor and Author (with Professor Boyle)

A Primer on Powers, HOFSTRA PROPERTY LAW JOURNAL, Vol.2, No.1 (Fall 1988)

ESTATE PLANNING, PROBATE AND TRUST NEWS, A NEWSLETTER OF THE ESTATE PLANNING, PROBATE AND TRUST LAW SECTION OF THE SOUTH CAROLINA BAR (September 1988), Editor and Author (with Professor Boyle)

Recent Amendments to the Probate Code (Part Two), THE TRANSCRIPT, Vol. 32, No. 9 (September 1988)

General Assembly Enacts Amendments to Probate Code, THE TRANSCRIPT
Vol. 32, No.8 (August 1988)

ESTATE PLANNING, PROBATE AND TRUST NEWS, A NEWSLETTER OF THE
ESTATE PLANNING, PROBATE AND TRUST LAW SECTION OF THE SOUTH
CAROLINA BAR (June 1988), Editor and Author (with Professor Boyle)

Estate Planning Studies: Current Developments in Trust and Estate Law
(Merrill-Andersen) (with Professor Boyle) (1988)

ESTATE PLANNING, PROBATE AND TRUST NEWS, A NEWSLETTER OF THE
ESTATE PLANNING, PROBATE AND TRUST LAW SECTION OF THE SOUTH
CAROLINA BAR (February 1988), Editor and Author (with Professor
Boyle)

*Selected Substantive Provisions of the South Carolina Probate Code: A
Comparison with Previous South Carolina Law*, 38 S.C.L. REV. 611
(1987)

PROBATE AND PROPERTY, THE MAGAZINE OF THE REAL PROPERTY,
PROBATE AND TRUST SECTION OF THE AMERICAN BAR ASSOCIATION,
Vol.1, Nos. 1-5 (January-September 1987), *Keeping Current - Property*
(author and editor)

*Estate Planning: A Consideration of Selected Differences Between South
Carolina and Federal Estate and Gift Tax Law and Possible Tax Savings
Therefrom*, 30 S.C.L. REV. 584 (1979)

Presentations:

SC Bar Al Todd Estate Planning Workshop; “Ethics Update,” July 11, 2015; Kiawah Island SC; Moderator and Speaker

South Carolina Tort Law Seminar; “Update,” February 13, 2015; Columbia SC; Speaker

SC Bar Annual Meeting Probate Estate Planning and Trust CLE; “Probate Update,” January 23, 2015; Columbia, SC; Speaker

19th Annual Charleston Probate Court Seminar; “Ethics Update,” December 12, 2014; Charleston SC; Speaker

22nd Annual Probate Bench Bar Seminar; “Probate Update,” September 12 2014; Columbia, SC; Speaker

SC Probate Judges Association Annual Meeting Seminar; “Update,” May 30, 2014; Columbia, SC; Speaker

18th Annual Charleston Probate Court Seminar; “Probate Update,” December 12, 2013; Charleston SC; Speaker

SC Bar Probate Amendments Seminar; “Probate Code Revisions,” November 19, 2013; Columbia SC; Speaker

Greenville County Probate Court Seminar; “Probate Code Revisions,” October 4, 2013; Greenville SC; Speaker

SC Bankers Association Trust Conference; “Probate Code Revisions,” April 25, 2013; Columbia SC; Speaker

21st Annual Probate Bench Bar Seminar; “Probate Update,” September 6 2013; Columbia, SC; Speaker

SC Bar Al Todd Estate Planning Workshop; “Update,” July 12, 2013; Kiawah Island SC; Moderator and Speaker

17th Annual Charleston Probate Court Seminar; “Probate Update,” December 16, 2012; Charleston SC; Speaker

20th Annual Probate Bench Bar Seminar; “Probate Update,” September 7 2012; Columbia, SC; Speaker

SC Bar Real Estate Intensive Workshop; “Update,” July 13, 2012; Kiawah Island SC; Moderator and Speaker

Sixteenth Annual Charleston County Probate Court Seminar; “Recent Cases and Legislative Update,” December 13, 2011; Charleston, SC; Speaker

SC Probate Judges Association, “Probate Code Revisions Redux,” November 7, 2011, Columbia, SC; Moderator

SC Bar, 19th Annual Probate Bench Bar; “Probate Update,” September 9, 2011, Columbia, SC; Speaker

Webinar, “Hiatus Construction Issues; July 22, 2011; Columbia, SC, Speaker

SC Probate Judges Association, “Probate Code Revisions,” July 11, 2011, Columbia, SC; Moderator

SC Bar, Al Todd Estate Planning Workshop; July 8-9, 2011, Kiawah Island, SC; Moderator

SC Probate Judges Association Conference; “Hiatus Constructions Issues,” February 16, 2011; Speaker

SC Bar, “The Code - 20 Years Later,” Panelist, January 21, 2011

Fifteenth Annual Charleston County Probate Court Seminar; “Recent Cases and Legislative Update,” December 16, 2010; Charleston, SC; Speaker

National College of Probate Judges Annual Meeting and Seminar; “Probate Update,” November 10, 2010; Charleston, SC; Speaker

SC Bar, 18th Annual Probate Bench Bar; “Probate Update,” September 10, 2010, Columbia, SC; Speaker

SC Bar, Real Estate Intensive Workshop; “Ethics,” July 9-10, 2010, Kiawah Island, SC; Speaker

Fourteenth Annual Charleston County Probate Court Seminar; “Recent Cases and Legislative Update,” December 15, 2009; Charleston, SC; Speaker

SC Law Review, Fourth Circuit Symposium, October 16, 2009, Columbia, SC; Moderator

SC Bar, 17th Annual Probate Bench Bar; “Probate Update,” September 11, 2009, Columbia, SC; Speaker

SC Bar, Al Todd Estate Planning Workshop; July 10-11, 2009, Kiawah Island, SC; Moderator

Thirteenth Annual Charleston County Probate Court Seminar; “Recent Cases and Legislative Update,” December 11, 2008; Charleston, SC; Speaker

National College of Probate Judges Annual Meeting and Seminar; “Power to Adjust Principal and Income Allocations,” November 15, 2008; Savannah, GA; Speaker

SC Bar, 16th Annual Probate Bench Bar; “Probate Update,” September 12, 2008, Columbia, SC; Speaker

SC Bar, Real Estate Intensive Workshop; “Ethics,” July 18-19, 2008, Kiawah Island, SC; Speaker/Moderator

Twelfth Annual Charleston County Probate Court Seminar; “Recent Cases and Legislative Update,” December 7, 2007; Charleston, SC; Speaker

SC Bar, 15th Annual Probate Bench and Bar, “Probate Update,” September 14, 2007, Columbia, SC; Speaker

SC Bar, Al Todd Estate Planning Workshop, July 13-14, 2007, Kiawah Island, SC; Speaker/Moderator

Eleventh Annual Charleston County Probate Court Seminar; “Recent Cases and Legislative Update,” December 7, 2006; Charleston, SC; Speaker

SC Bar, 14th Annual Probate Bench and Bar, “Probate Update,” September 15, 2006, Columbia, SC; Speaker

SC Bar, Intensive Real Estate Workshop, “Ethics,” July 21, 2006, Kiawah Island, SC; Speaker

SC Bar, The Uniform Trust Code Workshop, “Part 11,” May 2, 2006, Columbia, SC; Speaker

SC Bar, 20/20: An Optimal View of 2005, “The South Carolina Trust Code,” December 16, 2005, Columbia, SC; Speaker

Tenth Annual Charleston County Probate Court Seminar; “Recent Cases and Legislative Update,” December 15, 2005; Charleston, SC; Speaker

SC Bar, The Uniform Trust Code, “The South Carolina Trust Code,” December 14, 2005, Columbia, SC; Speaker

The American College of Trust and Estate Counsel, Southeast Regional Meeting, “The Uniform Trust Code,” September 22, 2005, Asheville, NC; Speaker

SC Bar, 13th Annual Probate Bench and Bar, “Probate Update,” September 16, 2005, Columbia, SC; Speaker

SC Bar, SC Association of CPAs Litigation Conference, “Litigation Update,” September 15, 2005; Speaker

SC Bar, Al Todd Estate Planning Seminar, “Probate Update,” July 15, 2005; Kiawah Island, SC; Speaker

National College of Probate Judges; “Uniform Trust Code,” May 14, 2005; Amelia Island, Florida; Speaker

SC Bar; Annual Meeting, “Recent Developments,” January 21, 2005; Charleston, SC; Speaker

Ninth Annual Charleston County Probate Court Seminar; “Recent Cases and Legislative Update,” and “Ethical Issues in Probate and Estate Administration,” December 16, 2004; Charleston, SC; Speaker

Columbia Estate Planning Council, “Uniform Trust Code,” December 2, 2004, Columbia, SC; Speaker

SC Bar; The Twelfth Annual Probate Bench Bar; “Recent Developments,” September 17, 2004; Columbia, SC; Speaker

South Carolina Association of CPAs; Litigation Conference; “Probate Update,” September 16, 2004; Columbia, SC Speaker

Eighth Annual Charleston County Probate Court Seminar; “Recent Cases and Legislative Update,” and “Ethical Issues in Probate and Estate Administration,” December 10, 2003; Charleston, SC; Speaker

American College of Trust and Estate Counsel; National Meeting CLE; “Hot Topics”; October 31, 2003; Charleston, SC; Speaker

American College of Trust and Estate Counsel; Southeastern Regional Meeting CLE; “Recent Developments,” October 4, 2003; Savannah, GA; Speaker

SC Bar, Intensive Estate Planning Workshop; “Ethical and Planning Issues,” September 26, 2003; Daufuskie Island, SC, Speaker

SC Bar; The Eleventh Annual Probate Bench Bar; “Recent Developments,” September 12, 2003; Columbia, SC; Speaker

Seventh Annual Charleston County Probate Court Seminar; “Recent Cases and Legislative Update,” and “Ethical Issues in Probate and Estate Administration,” December 12, 2002; Charleston, SC; Speaker

American College of Trust and Estate Counsel; Southeastern Regional Meeting CLE; “Probate Update”; November 8, 2002; Speaker

SC Bar; The Tenth Annual Probate Bench Bar; “Recent Developments,” September 13, 2002; Columbia, SC; Speaker

SC Bar; Advanced Probate Practice in South Carolina; "Update on South Carolina Probate Decisions," and "Ethics Update," June 21, 2002; Columbia, SC; Speaker

National College of Probate Judges; "Recent Probate and Tax Developments," May 3, 2002; Key West, Florida; Speaker

Sixth Annual Charleston County Probate Court Seminar; "Recent Cases and Legislative Update," and "Ethical Issues in Probate and Estate Administration," December 13, 2001; Charleston, SC; Speaker

Attorney & CEO Clinic; "Ethics," December 12, 2001; Columbia, SC; Speaker

American College of Trust and Estate Counsel Regional CLE; Recent Nontax Developments, Pinehurst, NC, September 21, 2001; Speaker

SC Probate Judges Bench and Bar CLE; Recent Probate Developments, Columbia, SC, September 14, 2001; Speaker

Advanced Probate Practice in South Carolina; Probate Update, Columbia, SC, June 15, 2001; Speaker

SC Probate Judges Seminar; Probate Update, May 11, 2001, Columbia, SC, Speaker

Fifth Annual Charleston County Probate Court Seminar; "Recent Cases and Legislative Update," and "Ethical Issues in Probate and Estate Administration," December 12, 2000; Charleston, SC; Speaker

SC Bar; "Recent Probate Developments," September 8, 2000; Columbia, SC; Speaker

SC Bar; "Ethics for Tax Planning Professionals," June 17, 2000; Hilton Head, SC; Speaker

SC Probate Judges Association; "Disclaimers," February 11, 2000; Columbia, SC; Speaker

SC Bar; "Recent Developments," January 22, 2000; Charleston, SC; Speaker

South Carolina Bankers Association; "Current Update of South Carolina Probate Law," May 4, 1999; Columbia, SC; Speaker

South Carolina Probate Judges Association; "Recent Developments," February 23, 1999; Columbia, SC; Speaker

SC Bar; "Recent Developments," January 22, 1999; Charleston, SC; Speaker

Third Annual Probate Court Seminar Benefiting the Historic Courthouse; "Recent Probate Developments and Ethical Issues," December 17, 1998; Charleston, SC; Speaker

Attorney and CEO Clinic; "Current Estate and Probate Issues," December 1, 1998; Columbia, SC; Speaker

SC Bar; "Fees and Ethics," November 21, 1998; Columbia, SC; Speaker

American College of Trust and Estate Counsel; "Recent Developments," October 4, 1998; Charleston, SC; Speaker.

SC Bar Sixth Annual Probate Court Bench and Bar; "Recent Probate Developments," September 11, 1998; Columbia, SC; Speaker

Charleston County Bar; "Ethics and Fees," July 8, 1998; Charleston, SC; Speaker

ALI-ABA; "Estate Planning Practice Update," May 20, 1998; Washington, D.C. (satellite videocast); Speaker

University of Miami Estate Planning Institute, "Workshop: The Dog Wags Back (Again) – Another Update on Non-tax Issues Affecting the Estate Planning and Probate Practitioner," January 7; Miami, FL; Speaker

University of Miami Estate Planning Institute, "Recent Trends in Probate: The Dog Wags Back (Again) – Another Update on Non-tax Issues Affecting the Estate Planning and Probate Practitioner," January 6; Miami, FL; Speaker

Charleston County Probate Court, "SC Developments" and "Ethics Update," December 12, 1997; Charleston, SC; Speaker

USC School of Law Class of 1977 Reunion Ethics CLE, "Ethical Issues," October 10, 1997; Columbia, SC; Speaker

South Carolina Bar Fifth Annual Probate Court Bench and Bar CLE, "Recent Developments," September 5, 1997; Columbia, SC; Moderator-Speaker-Coordinator

USC Law School Estate Planning Workshop, "Ethics," August 8-10, 1997; Hilton Head Island, SC; Speaker-Coordinator

USC Law School Estate Planning Workshop, "Ethics," July 25-27, 1997; Hilton Head Island, SC; Speaker-Coordinator

SC Probate Judges Conference, "Recent Developments" and "Ethics," May 22, 1997; Columbia, SC; Speaker

SC Bankers Association, "Fiduciary Update," May 21, 1997; Columbia, SC; Speaker

Sumter Estate Planning Council, "Recent Estate Planning Developments," May 20, 1997; Sumter, SC; Speaker

MUSC/Julian Bush Estate Planning Institute, "Ethics Update," April 24, 1997; Charleston, SC; Speaker

Charleston County Probate Court, "SC Developments" and "Ethics Update," December 12, 1996; Charleston, SC; Speaker

South Carolina Bar Annual Meeting, "Real Estate Issues and the SCPC," June 7, 1996; Myrtle Beach, SC; Speaker

South Carolina Bar Mid-Year Meeting, "The Elective Share Under the UPC," January 26, 1996; Charleston, SC; Moderator-Speaker-Coordinator

Community Financial Institutions of SC Attorney & CEO Clinic, "Ethical Issues: Recent Developments," December 7, 1995; Columbia, SC; Speaker

South Carolina Defense Trial Attorneys Association, "Ethical Issues Involving Alternative Fee Arrangements," November 11, 1995; Sea Island, GA; Speaker

Saturday Mornings at the Law School, "Ethical Issues Facing Office Practitioners," November 18, 1995; Columbia, SC; Speaker

Sumter Estate Planning Council, "Recent Probate Developments," October 25, 1995; Sumter, SC; Speaker

South Carolina Bar Third Annual Probate Court Bench and Bar CLE, "Recent Developments," September 8, 1995; Columbia, SC; Moderator-Speaker-Coordinator

MUSC Estate Planning Seminar, "Current Non-Tax Issues in Estate Planning," May 13, 1995; Charleston, SC; Speaker

Columbia Estate Planning Council, "Recent Cases and Pending Legislation," March 28, 1995; Columbia, SC; Speaker

SC Bar Mid-Year Meeting, "Recent Probate Developments," January 14, 1995; Charleston, SC; Speaker

Saturday Mornings at the Law School, "Ethical Issues Facing Office Practitioners," December 3, 1994; Columbia, SC; Speaker

Mortgage Bankers of Greater Greenville, "RESPA," November 10, 1994; Greenville, SC; Speaker

South Carolina Bankers Association Trust Seminar, "Recent Trust Law Developments," October 25, 1994; Columbia, SC; Speaker

American College of Trust and Estate Counsel Southeastern Regional CLE, "Recent Probate Developments," October 15, 1994; Greenville, SC; Speaker

USC School of Law Class of 1969 Reunion Ethics CLE, "Recent Ethical Developments Affecting the Estate Planning and Probate Lawyer," October 7, 1994; Columbia, SC; Speaker

Second Annual Probate Court Bench/Bar Seminar, "Family Protection Under the SCPC," September 10, 1994; Columbia, SC; Speaker and Panelist

South Carolina Mortgage Bankers Association, "Recent Changes to RESPA," March 16, 1994; Myrtle Beach, SC; Speaker

USC Law School, "Recent Developments in Ethical Issues Relating to the Office Practitioner," January 8, 1994; Columbia, SC; Speaker and Co-Moderator

North Carolina Association of Mortgage Brokers, "Liability Issues," July 22, 1993; Greensboro, NC; Speaker

Vermont State Bar, "Ethics in Estate Planning," May 28, 1993; Speaker

South Carolina Bar, "Ethics and the Real Estate Closing," Real Estate Practices Section; June 4, 1993; Hilton Head, SC; Speaker

Wachovia Bank of North Carolina, "Ethics and the Trust Department," May 11, 1993; Charlotte, NC; Speaker

South Carolina Probate Judges CLE, "Recent Developments," May 21, 1993; Columbia, SC; Moderator-Speaker

Charleston County Real Estate Practices Section, "Ethics and the Real Estate Closing," April 23, 1993; Charleston, SC; Moderator-Speaker

Greenville County Tax, Probate, Estate Planning and Trust Section, "Advance Health Care Directives," January 20, 1993; Greenville, SC; Speaker

USC Law School, "Ethical Issues in Office Practice," December 5, 1992; Columbia, SC; Speaker and Co-Moderator

Richland County Bar, "Lawyer Advertising," November 23, 1992; Columbia, SC; Speaker

CCBREP; "Ethics in the Practice of Real Estate," Columbia, SC; Speaker

USC Tax Workshop; "Seifert and Its Aftermath; Health Care Documents"; July 24-26; Hilton Head, SC; Speaker-Coordinator

South Carolina Probate Judges CLE, "Trust Law Issues," May 15, 1992; Speaker-Moderator

South Carolina Bankers Association Continuing Trust Education Seminar, "SC Statutory and Case Law Issues," May 6, 1992; Speaker

University of Miami Estate Planning Institute, "The Dog Wags Back: Recent Developments in Probate Law," January 1992; Speaker

University of South Carolina Law School CLE, "Professional Responsibility for the Estate Planner," December 13, 1991; Speaker

South Carolina Bar/USC CLE, "Professional Responsibility for the Office Practitioner," December 6, 1991; Speaker

National College of Probate Judges CLE, "Recent Trends: The Will, The Elective Share and Antenuptial Agreements, and the Incompetent Person's Estate," November 14-16, 1991; Speaker

ALI/ABA, "The Uses of Insurance in Estate Planning," October 16-18, 1991; Speaker

South Carolina Bar CLE Seminar, "Probate Law: Drafting Wills and Trusts and Handling Estate Problems," September 20, 1991; Speaker

C&S/Sovran Trust Company CLE Program, "Current Developments in Trust and Estate Law," September 18, 1991; Speaker

Greenville County Bar Real Property Section CLE, "The SC Statutory Rule Against Perpetuities," August 20, 1991; Speaker

USC Tax Workshop, "Ethical Considerations for Estate Planners," July 19-20, 26-27, 1991; Speaker-Coordinator

South Carolina Probate Judges CLE, "Recent Probate Code Developments and Judicial Problem Solving," July 12, 1991; Speaker

South Carolina Bar Probate, Estate, Planning and Trust Section CLE (Annual Meeting), "Ethical Considerations in Estate Planning," (with Todd), June 7, 1991; Speaker

Sumter County Bar Estate Planning Council, "The Uniform Statutory Rule Against Perpetuities," January 22, 1991; Speaker

American College of Trust and Estate Counsel (Southeastern Regional Seminar), "Recent Probate Developments," November 10, 1990; Speaker

South Carolina Association of Probate Judges, "Problems in Probate and Trust Administration," October 16, 1990; Speaker

South Carolina Bar CLE, "Probate Practice Manual," August 24, 1990; Speaker-Coordinator

USC Tax Workshop, "Probate, Right to Die, and Related Issues," July 20-22, 27-29, 1990; Speaker-Coordinator

South Carolina Probate Judges CLE, "1990 Amendments to the SCPC," July 13, 1990; Speaker

South Carolina Bankers Association, "1990 Continuing Trust Education Seminar," May 9, 1990; Speaker

South Carolina Bar CLE, "Everything You Always Wanted to Know About Probate But Were Afraid to Ask," September 8, 1989; Speaker-Coordinator

USC Tax Workshop, "Current Issues in Probate Practice," July 21-22, 28-29, 1989; Speaker-Coordinator

Greenville County Bar Tax, Estate Planning and Probate Section CLE, "Critical Problems of Probate Practice," November 16, 1988; Speaker

Probate for General Practitioners: The Basics; South Carolina Bar CLE Division sponsored; Moderator, Panelist and Speaker; Topic - "Recent Amendments to the South Carolina Probate Code," October 7, 1988

Fiduciary Administration Seminar; South Carolina CLE Division accredited; Speaker; Topic - "The Elective Share and Family Protection; Update on Estate Planning Topics," September 21, 1988

South Carolina Bankers Council; Speaker; Topic - "Recent Amendments to the South Carolina Probate Code," September 6, 1988

USC Tax Workshop, "Elective Share and Family Protection," July 22-24, 29-31, 1988

South Carolina Probate Judges CLE; South Carolina Bar CLE Division sponsored; Speaker; Topic - "Powers of a Personal Representative (With Emphasis on Distribution)," July 22, 1988

Sumter Estate Planning Council; South Carolina Bar CLE Division accredited; Speaker; Topic - "The Elective Share," May 17, 1988

Probate for General Practitioners: The Basics; South Carolina Bar CLE Division sponsored; Coordinator, Moderator and Panelist, April 15, 1988

South Carolina Bar Mid-Year Meeting Estate Planning and Probate Section CLE; South Carolina Bar CLE Division sponsored; Speaker (with Professor Boyle); Topic - "Generation Skipping and Recent Developments in Probate," January 22, 1988

Practice under the New South Carolina Probate Code; Winthrop College CLE sponsored; South Carolina Bar CLE Division accredited; Speaker;

Topic - "Changes in Will Construction and Determination of Intestate Heirs," August 28, 1987

South Carolina Probate Judges CLE; South Carolina Bar CLE Division sponsored; Speaker; Topic - "Changes in Will Construction and Determination of Intestate Heirs," September 17, 1987

The Probate Code; Charleston County Bar sponsored; South Carolina Bar CLE Division accredited; Speaker; Topic - "The New Probate Code: Intestate Succession; Elective Share; Exempt Property; Anti-lapse; Family Protection," June 26, 1987

South Carolina Bar Annual Meeting Estate Planning and Probate Section CLE; South Carolina Bar CLE Division sponsored; Speaker; Topic - "Technical Corrections to the South Carolina Probate Code," June 5, 1987

Practical Aspects of the South Carolina Probate Code; South Carolina Bar CLE Division sponsored; Speaker; Topic - "Intestate Succession; Nonprobate Transfers," April 24, 1987

South Carolina Bankers Association; South Carolina Bar CLE Division accredited; Coordinator, Moderator, Panelist and Speaker; Topic - "South Carolina Probate Code Revisions," November 18, 1986

The South Carolina Probate Code; South Carolina Bar CLE Division sponsored; Panelist and Speaker; Topic - "SCPC: Articles II and VI - Detailed Coverage of Intestacy and Wills," September 5, 1986

Richland County Bar Estate Planning Section Meeting; South Carolina Bar CLE Division accredited; Speaker; Topic - "Law School Training for Estate Planners," August 19, 1986

The South Carolina Probate Code; USC Law School sponsored; South Carolina Bar CLE Division accredited; Coordinator, Moderator, Panelist and Speaker; Topic - "Selected Substantive Provisions," June 28, 1986

