

# Paralegal Pipeline

Chester County  
Paralegal Association

~ Fall 2015 ~

## 2016 Scholarship!

CCPA is still accepting applications for the 2016 Paralegal Studies Scholarship!

For the 2016 academic year, CCPA is sponsoring a \$1,000 scholarship to one deserving individual pursuing a degree or certificate in Paralegal Studies. Instructions for the application process and eligibility requirements may be found by visiting our website: [chescoparalegal.org](http://chescoparalegal.org).

Please be sure to consider submitting your own application for the scholarship, and circulate the information to friends and family that may be working towards a career as a Paralegal!

Any questions concerning the application or eligibility requirements may be directed to our Scholarship Chair, Maureen O'Hara, at <mailto:MOH436@comcast.net>.

Deadline for submitting applications is **December 15, 2015!**

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## Wills for Heroes – Excellent Volunteer Opportunity

A terrific volunteering opportunity, and a chance to say “thank you” to the men and women who serve and protect us (military service, public safety, etc.), the WILLS FOR HEROES campaign is in need of assistance in the form of witnesses and notaries for

their upcoming event on **December 12, 2015.**

**Location:** The event will be held at the **Chester County Public Safety Training Campus** located at **137 Modena Road, Coatesville, PA 19320.**

**Event Time:** The event will run from 9:00 am until approximately 4:30 pm (or perhaps sooner) with training beginning at 9:00 am and appointments beginning at 11:00 am. The organizers currently have 40 appointments scheduled.  
*(cont'd pg 3)*

**Training:** Training is mandatory for all new volunteers (other than notaries and witnesses), and strongly encouraged for those who have not volunteered in the past 6 months. Training begins promptly at 9:00 am for attorneys, law students,

## Volunteer Opportunity (cont'd)

paralegals, and paralegal students so please try to arrive prior to 9:00 am.

**Notaries and Witnesses:** Please arrive by 11:30 am (notaries please remember to bring your equipment).

**Meals:** Breakfast and lunch will be provided. However, the organizers are unsure of what is being offered so if you have any dietary

restrictions or concerns please plan accordingly.

**Dress:** These events are casual so jeans are acceptable and encouraged.

**Contact Information:** If you need to reach either of the lead coordinators on or before the event, you can do so via email at [joley@eckertseamans.com](mailto:joley@eckertseamans.com) or [courtneywiggins08@gmail.com](mailto:courtneywiggins08@gmail.com). This is a wonderful service and the first responders we meet are

always very thankful for the day we spend with them. However, please keep in mind the sacrifices they and their families make every day to ensure our safety. Please remember to take the time to thank them for their service and commitment to our safety and our communities.



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## 2016 Officers – Nominations soon... Consider serving!

2016 is fast approaching, and that means there will soon be a call for nominations for individuals to fill any open/vacant Officer and Committee Chair positions on the Board of CCPA.

Being an Officer or Committee Chairperson is an excellent way to

become more involved in your paralegal association. You are part of the team that plans and decides the actions and future of the association and its role in its members' professional lives.

The time commitments for any of the Office or Committee Chair

positions are extremely easy on your schedule and, with a strong team, the work of the Board is equally shared, great things happen, and you make a difference.

Please consider accepting a nomination (or nominate yourself!), or speak with your paralegal colleagues about their

possible interest – and nominate them!

Any questions concerning the duties of the Officers or Committee Chairs can be directing to any of the Board members – all our contact info can be found on [chescoparalegal.org](http://chescoparalegal.org).

## The Importance of Fiduciary Depth (or – Have a Backup Plan!)

**Donald P. Bristol, Pa.C.P. & Duke Schneider, Esq.**

Article appearing in Fall 2015 edition of *Initiative*, MacElree Harvey, Ltd.'s official newsletter. Reprinted by permission.

When contemplating your estate plan, one of the items often assumed to be a simple task is the decision as to the naming of the executor of your Will, or the Trustee of any trusts created under your Will. For married couples the spouse is almost always the first named. After that, it is almost always the children or other members of the family. As with business planning, the best practice is to have some sort of succession plan in mind when deciding who will be responsible for administering your estate or trust when you're gone.

A first consideration in considering naming children or other family members is whether they will have the sophistication to serve, and the time to handle the tasks associated with their fiduciary duties. If you're thinking of naming your children as executors or trustees, consider whether you are going to name them in some sort of hierarchy, or if you are going to name them as a group. Naming children in a hierarchy does not necessarily mean "I love you more" or "I trust you more than the others." We counsel clients to speak with their children about the duties entailed in administering an estate, the cost-effectiveness of a single fiduciary versus a group of fiduciaries being called upon to review and sign documents and facilitate the

administration and the group and family dynamic factors when multiple siblings are serving as fiduciaries.

For various reasons, including geography, sophistication, and "life issues," it is not uncommon for clients to lack a depth of choices among family members to serve as executor or trustee. In these situations, corporate fiduciaries (bank trust departments or trust companies) are a good choice to serve. And while these fiduciaries are paid for their services, their fees are usually quite reasonable. Naming a corporate fiduciary can also give clients confidence that the fiduciary duties will be carried out timely and professionally.

If it should happen that none your named executors are able or willing to serve in that capacity, or if you die without having created a Will (which is called intestacy), Pennsylvania has specific rules concerning who has the right to serve as the executor/administrator of an estate in the absence of a named successor (20 Pa.C.S.A § 3155 (b)). In the absence of a named successor in your testamentary documents (or your intestacy), in the following order, those who have the right to

## Have a Backup Plan! – cont'd

serve are (the statute, summarized and with some emphasis added):

1. Those entitled to the residuary estate under the Will, and in the absence of a Will;
2. The surviving spouse, and in the absence of a surviving spouse;
3. Those entitled under the intestate law of Pennsylvania (according to the size of the shares of those parties), and in the absence of such party(ies);
4. The principal creditors of the decedent at the time of his (or her) death, and in the absence of such party(ies);
5. Other fit persons.
6. If any of these should renounce their right to serve, the Register of Wills may appoint someone to succeed them in preference to the above order of successors.
7. A guardianship support agency serving as guardian of an incapacitated person who dies during the guardianship administered pursuant to Subchapter F of Chapter 55

(relating to guardianship support).

8. A redevelopment authority formed pursuant to the act of May 24, 1945, known as the Urban Redevelopment Law.

Conclusion: The best defense for avoiding your estate moving into hands you didn't anticipate or want is to have a backup plan that covers the bases from fiduciary to beneficiary. Be sure thoughtfully to plan out and dictate a solid succession plan for your executors and trustees.



## Upcoming Events

### NOVEMBER

17<sup>th</sup> – Peirce College’s Legal Studies Student Assoc. Networking & Symposium Event

19<sup>th</sup> – SILENT AUCTION to benefit Legal Aid of Southeastern PA

- Side Bar Restaurant (West Chester, PA) – 5:00-7:30 p.m.
- Add this one to your calendar, and be on the lookout for more details from the event coordinators!

### DECEMBER

3<sup>rd</sup> – CCPA Annual Holiday Party – Radley Run Country Club (see p.5 for details).

12<sup>th</sup> – Wills For Heroes event (see p.2 for details)

CCPA  
PO Box 295  
West Chester, PA 19381

[chescoparalegal.org](http://chescoparalegal.org)

*The Chester County Paralegal Association, based in Chester County, Pennsylvania, was formed in 1992 with the objectives and purposes of promoting and maintaining high standards and ethics in the paralegal profession, of providing a forum for the exchange of information about the profession, of enhancing the role of paralegals in the legal community, and of encouraging the continuing legal education of paralegals. The Chester County Paralegal Association is a member of the [Keystone Alliance of Paralegal Associations](#) and the [National Federation of Paralegal Associations, Inc.](#)*



### Articles always accepted!

If you'd like to submit an article for publication in [Paralegal Pipeline](#), or you have recently written an article for your workplace, or have any other written publications on any number of subjects, particularly as they relate to the legal field and paralegal profession, please forward that to our Newsletter

Coordinator. Share your thoughts/expertise/ideas with your fellow CCPA members, and also supplement your resume with the fact that your writings have been published in a newsletter circulated to a base of at least 80-100 recipients

(which is also then published on our website!).

Contact:  
Don Bristol  
<mailto:dbristol@macelree.com>

You are cordially invited to the  
**Chester County Paralegal Association**  
 2015 Annual Holiday Party

Thursday, December 3, 2015  
 Radley Run Country Club

Open bar - 6:00 p.m. - 7:00 p.m.

Dinner - 7:00 p.m.

Members: \$40 / Guests: \$45

Please RSVP to Barbara Butler ([bbutler@macelree.com](mailto:bbutler@macelree.com))

(610) 840-0266

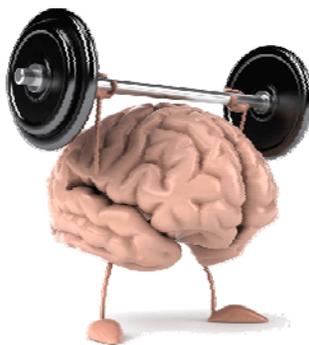
by Monday, November 23, 2015

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Yikes!

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