

PBA Real Property, Probate and Trust Law
Section and PBA Solo and Small Firm Section

JOINT RETREAT

October 7-9, 2026

Omni Bedford Springs Resort

2198 Sweet Root Rd.

Bedford, PA 15522

814-623-8100

www.omnihotels.com/hotels/bedford-springs



Nestled in the mountains of Pennsylvania's scenic Cumberland Valley, the Omni Bedford Springs Resort is the perfect setting to welcome members of the PBA Real Property, Probate and Trust Law Section and the PBA Solo and Small Firm Section. This year's program features two CLE tracks with sessions tailored to a variety of practice areas including practice-building tips, AI in legal practice, real estate and probate updates, tech insights, "death and dirt" topics, connecting with a multigenerational workforce and more. A closing keynote address from Pennsylvania Supreme Court Justice David N. Wecht will highlight the significance of Pennsylvania's Constitution at 250 years.

Just 90 minutes from Pittsburgh and Harrisburg and three hours from Philadelphia, the AAA Four Diamond award-winning Omni Bedford Springs Resort offers luxurious accommodations in a historic, picturesque setting. Guests can enjoy an array of exceptional amenities, from the Springs Eternal Spa and indoor pool to afternoon tea service, vibrant hiking trails and a variety of on-site activities. For those seeking time to relax, simply settle into a rocking chair on the grand porch and take in the resort's timeless charm.



WEDNESDAY WELCOME RECEPTION

Kick off the retreat by attending Wednesday's Welcome Reception — meet new faces, reconnect with colleagues and enjoy a quick beverage to set the tone for the days ahead.

THURSDAY'S RECEPTION AND DINNER

Enjoy an evening of great food and spirited competition as you and your tablemates take part in an entertaining game of Quizzo hosted by PBA Executive Director Matt Holliday.

CLE CREDITS

The Pennsylvania Bar Institute is approved by the Pennsylvania Supreme Court Continuing Legal Education Board as an accredited CLE provider. The Joint Retreat has been approved by the Pennsylvania Continuing Legal Education Board for 8.5 CLE credits, including 4 ethics credits.

COURSE MATERIALS

Covered by your registration fee, a URL-secured link will be emailed to all registrants prior to the joint retreat for you to download, view and print the materials you wish to access during the meeting. Hard copies are not available.

RESORT RESERVATIONS

Guest rooms have been reserved at a discounted rate of \$229 per night, including breakfast and a daily taxable resort fee of \$29 at the Omni Bedford Springs Resort for the Joint Retreat. Reservations can be made [online](#) or by calling 877-409-6664. **The discounted rate is available until 11 a.m. on Wednesday, September 11, 2024. After this date, reservations and rates will be subject to availability. Check-in is 4 p.m., and check-out time is 11 a.m.** Guestrooms blend historic charm with modern comfort, offering king or queen beds, marble-vanity bathrooms and plush, premium linens for a relaxing stay.

SOLD OUT



SPRINGS EXTERNAL SPA

Arrive early or stay a little longer! The Springs Eternal Spa delivers exceptional wellness experiences designed to refresh, soothe and invigorate both mind and body. In addition to the award-winning spa, an indoor pool, yoga and meditation classes and a full fitness center await you. Reservations are strongly encouraged to ensure availability. Contact the concierge at 814-624-5633.

PARKING

Complimentary valet and self-parking are available.

WHAT TO WEAR

Suggested attire for the meeting is business casual. Please wear your PBA name badge to all events.

PHOTOGRAPHY DISCLAIMER

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**CELEBRATING
120 YEARS**

SCHEDULE OF EVENTS

Current at time of posting but subject to change

Wednesday, October 7

5 p.m. – 7 p.m..... Registration

8 p.m. – 9 p.m..... Joint Welcome Reception

Thursday, October 8

7 a.m. – 3:15 p.m..... Registration/Exhibits

7 a.m. – 8 a.m..... Breakfast Buffet

8:15 a.m. – 9:15 a.m..... **Plenary Session: AI in Legal Practice: Tools, Governance and the Ethics of Getting It Right (A)**

This one-hour session gives estate planning, trust and probate attorneys a practical framework for evaluating, adopting and governing AI in their practice. We will cover what today's AI tools actually do and where they fit in legal work, from client intake and document drafting to research and matter management and, just as importantly, where they create risk. Attendees will leave understanding the confidentiality and data security obligations that come with AI use, the supervisory questions every firm needs to answer before staff start using these tools and the practical prompting techniques that separate reliable AI output from the kind that gets you in trouble. The session addresses competence under Rule 1.1, confidentiality under Rule 1.6 and supervisory responsibility under Rule 5.1, with reference to the Pennsylvania and Philadelphia Bar Joint Formal Ethics Opinion 2024-200 on the ethical use of AI. Attendees will leave with a practical action plan and a model AI Use Policy framework they can adapt for their own firm right away.

Speaker: Giuseppe Rodriguez, CEO, RDCS

1 Ethics CLE Credit

9:15 a.m. – 9:30 a.m..... Break

9:30 a.m. – 10:30 a.m..... **CONCURRENT SESSIONS**
A. Hot Tips Power Hour (B)

Join us for one of the most dynamic sessions of the Joint Retreat! Our powerhouse panel will break down the latest developments across a wide range of practice areas — including criminal law, family law, professional responsibility, government and administrative law, mediation and more. Not captivated by one topic? Give it a moment. Another sharp, timely insight is right on its heels. This is your chance to gather rapid-fire, practice-ready tips from leaders in the field.

Moderator: Anne N. John, Esq., John and John

Speakers: Amy J. Coco, Esq., Law Office of Amy J. Coco PLLC; Jonathan D. Koltash, Esq., Governor's Office of General Counsel; Candice L. Komar, Esq., Pollock Begg; Jay N. Silberblatt, Esq., Silberblatt Mermelstein PC; Suzanne S. Smith, Esq., Fresh Start Law

1 Sub. CLE Credit

SCHEDULE OF EVENTS

Current at time of posting but subject to change

B. Estate Law Update (C)

This annual update delivers a comprehensive review of the most significant recent developments in Pennsylvania estate law — from noteworthy court decisions and legislative changes to emerging practice issues shaping estate planning and estate administration. Attendees will benefit from a practical, insight driven panel discussion highlighting the past year's key shifts and what they mean for everyday trusts and estates practice.

Speakers: Nathan S. Catanese, Esq., Steptoe & Johnson PLLC; Jay R. Hagerman, Esq., Abernethy Hagerman & Miller PC

1 Sub. CLE Credit

10:30 a.m. – 10:45 a.m. Break

10:45 a.m. – 11:45 a.m. **CONCURRENT SESSIONS**

C. Make Better Business Decisions Based on Your Metrics (D)

Do you seem to have more questions about your practice than answers? Law firms are businesses, but they are not like other business. The metrics that you should look at in order to make solid business decisions will be different. This course will:

- Examine the typical business questions attorneys ask
- Provide the metrics and explain how to use them
- Enable you to focus in on just what you need, when you need it
- Enable you to be proactive in improving your firm's financial health

Most solo and small firms look at too much or too little information each month. This session will enable you to get it just right and still be able to find the additional data when you have a business question to address.

Speaker: Owen T. Carhart, Managing Partner, Business Optimization Group, LLC; Ellen Freedman, CLM, PBA Law Practice Management Coordinator

1 Sub. CLE Credit

D. Perspectives from the Bench and Bar: Civility in Today's Practice (E)

Solo and small firm practitioners face challenges and opportunities in their everyday practice. Civil conduct can facilitate better relationships with clients, other counsel and the court and help produce more favorable results while reducing the stress of practice. This ethics session will present perspectives and useful tips from the bench and practitioners that you can use in your practice.

Speakers: Hon. Cheryl A. Austin (Ret.); Hon. Hugh F. McGough, Allegheny County Court of Common Pleas; Anne N. John, Esq., John and John; Thomas G. Wilkinson, Esq., Cozen O'Connor

1 Ethics CLE Credit

12 p.m. – 2 p.m. **Luncheon/Plenary Session: Generations in the Workplace (F)**

Most workplaces today are comprised of multiple generational groups. Each generation, from the Silent Generation to Generation Z, brings different communication styles, skillsets and unique approaches to their work. In this session, we will identify the five generational groups in the current workforce and the ways they may complement and at times clash with each other. We will focus on the opportunities and strategies to engage a multigenerational workforce to build a culture for all employees to communicate, collaborate and advance in the workplace.

Moderator: Nancy Conrad, Esq., White and Williams LLP

SCHEDULE OF EVENTS

Current at time of posting but subject to change

Speakers: Hon. Cheryl L. Austin (Ret.); PBA President James R. Antoniono, DeBernardo Antoniono McCabe & Davis PC; Lance D. J. Greene, Esq., Saxton & Stump LLC; Renee Mattei Montgomery, Esq., Eckert Seamans Cherin & Mellott LLC

1.5 Sub. CLE Credits

2:15 p.m. – 3:15 p.m..... **CONCURRENT SESSIONS**
E. Hot Tech Tips (G)

Get ready for a fast-paced, practical tour through the tech tools that can elevate your law practice. This session will highlight smart, actionable tips for leveraging technology to strengthen your succession planning, bolster disaster preparedness and stay efficient while traveling. You'll walk away with immediately usable insights to help future-proof your practice.

Moderator: Jennifer L. Ellis, Esq.

Speakers: Nimah Z. Bhura, Esq., Hyland Levin Shapiro LLP; Kim L. Lengert, Esq., Lengert Law; Jennifer J. Riley, Esq., Law Offices of Jennifer J. Riley; Christopher D. Rothermel, Esq., Wolf Baldwin & Associates PC

1 Sub. CLE Credit

F. Real Estate Update (H)

This session will provide an overview of recent case law updates and legislation across a variety of real estate topics, industries and practice areas. Participants will gain valuable insights into current issues and changes in the law. The discussion will focus on zoning and municipal law, HOA and condo law, construction law, title defect issues, and general transactional matters.

Speakers: Reilly S. Noetzel, Esq., Barley Snyder; Chelsea M. Mague, Esq., Edward J. Krug & Associates

1 Sub. CLE Credit

3:15 p.m. – 6:30 p.m..... **Free time to enjoy the resort amenities**
 6:30 p.m. – 9 p.m..... **Reception and Dinner
 Awards Celebrations
 Live Quizzo Showdown**



SCHEDULE OF EVENTS

Current at time of posting but subject to change

Friday, October 9

7 a.m..... Mindfulness Walk

8 a.m. – 1:15 p.m..... Registration/Exhibits

8:15 a.m. – 9 a.m..... Breakfast

9 a.m. – 10 a.m..... **CONCURRENT SESSIONS**

G. Emotional Intelligence: Hire Smarter, Retain Longer — The EQ Advantage (I)

This session breaks down common law firm hiring mistakes that stem from overlooking EQ, and shows how to strengthen your selection, onboarding and retention practices. The session will also explore how EQ directly impacts attorney compliance, communication, conflict resolution, advancement and even firm culture. Learning about these “soft skills” will offer valuable opportunity for self-reflection and personal growth.

Speaker: Ellen Freedman, CLM, PBA Law Practice Management Coordinator

1 Sub. CLE Credit

H. A Novel Real Estate Solution to Family and Business Disputes, and Marijuana Dispensaries (J)

Pennsylvania’s Uniform Planned Community Act and, to a lesser extent, its Uniform Condominium Act have been used in unusual ways to help resolve family disputes in equitably dividing inherited homestead land or finding ways for shared custody parents to live on the same property. Business properties can be divided to allow former partners or business associates to remain in their current locations after the business is terminated. Shopping centers with lenders who prohibit marijuana dispensaries can have the offending use carved-out from the main property, to enhance the landlord’s financial return.

This course is an interactive exploration of novel uses for these two statutes to solve problems that may otherwise take extensive and expensive negotiations and solutions. While we will open the eyes of real estate practitioners to expanding the scope of their work, this session is specifically meant for attorneys who are not conversant in UCA and UPCA practice.

Speaker: Marshal S. Granor, Esq., Granor & Granor PC

1 Sub. CLE Credit

10 a.m. – 10:30 a.m..... Sponsor Break

10:30 a.m. – 11:30 a.m..... **CONCURRENT SESSIONS**

I. In the Hot Seat: An Interview With a Malpractice Defendant (K)

This program reviews key ethics and risk management issues in legal practice, including competence, effective communication and proper documentation. It addresses engagement letters, billing and payment strategies, client file management, supervision of staff and technology (including AI), appropriate use of texting and identifying and managing conflicts of interest.

Speakers: Bethann R. Lloyd, Esq., Burns White; Kenneth N. Schott III, Esq., Burns White

1 Ethics CLE Credit

J. PI-Proof Estate Plans: Tips From a Private Investigator (L)

Michael Zwick is an attorney turned private investigator with 25 years of experience tracking down missing heirs and uncovering inheritance assets. In this session, he’ll outline practical steps estate planning practitioners can take now to ensure their clients’ future fiduciaries have a far easier job — ideally many years down the road.

Speaker: Michael J. Zwick, Esq.

1 Sub. CLE Credit

SCHEDULE OF EVENTS

Current at time of posting but subject to change



11:45 a.m. – 1:15 p.m. **Lunch and Keynote Speaker**
Pennsylvania Constitution at 250 (M)
Justice David N. Wecht, Pennsylvania Supreme Court

A look at Pennsylvania's Constitution as it marks its 250th anniversary, exploring its history, evolution and ongoing impact on the commonwealth today.

1 Ethics CLE Credit

Registration Fee:

Registration fee includes 8.5 hours of CLE credits, URL link to download course materials, refreshment breaks and planned meal functions.

- ♦ PBA Section Member: **\$495**
- ♦ PBA Nonsection Member: **\$595**
- ♦ PBA YLD Member - First Time Attendee: **\$395**
- ♦ Non-PBA Member **\$855**

PBA YLD Member Discount

PBA YLD members who are attending the joint retreat for the first time save **\$100** on registration fees!

Meal Function Tickets for Guests:

This fee includes Wednesday's reception, Thursday's lunch and dinner and Friday's lunch.

- ♦ Spouse/guest (13 years old and older): **\$310 per person**
- ♦ Children (12 years old and younger): **\$150 per person**

Registration Deadline: Sept. 8, 2026

Click [Here](#) to Register Online

Questions? Contact [Holly Wertz](#).