



**RPTE LEADING THE DISCUSSION
AND ADVANCING THE PROFESSION**
2026-2027 Bar Year

September 8, 2026
ABA RPTE New Leader Training

Agenda – Welcome!

RPTE and the ABA Organization – *Ray Prather and Kellye Clarke, Chair and Chair Elect*

Standing Committee Resources -

- **Diversity, Equity and Inclusion** – *Brian Balduzzi, co-Chair, DEI Committee*
- **CLE** – *Marissa Dungey and Scott Schwefel, co-Chairs, CLE Committee*
- **Publications** – *Michael Sneeringer and Jeff Hopkins, co-Chairs, Publications*
- **Government Submissions** – *James Slaton and Bill LaPiana, co-Chairs*

Leading in RPTE – *Lisa Page, Phil Hirschfeld, and Lori Oliphant, co-Chairs/vice-Chair, GSC*

- **Leader Roles and Responsibilities**
- **Connecting and Communicating within RPTE**
- **Helpful Resources**
- **Q&A**



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Real Property, Trust and
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**RPTE LEADING THE DISCUSSION
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Welcome – RPTE and the ABA Overview

Ray Prather - RPTE Section Chair

Kellye Clarke - RPTE Chair-Elect

Welcome!

As a leader of a Group or Committee within the ABA's Real Property, Trust & Estate Section (RPTE), you can:

- Provide benefits to real property and trust and estate lawyers throughout the country providing a connection to the RPTE Section for them that allows them to building their practices, increase their knowledge, and improve their legal skills.
- Advance your own professional development by networking with, learning from, and sharing your knowledge with other real property and trust and estate lawyers nationally. These activities will help you become known nationally as an expert in your field.

We will discuss the Groups and Committees, but first, let's look at the Section and its overall organizational structure.

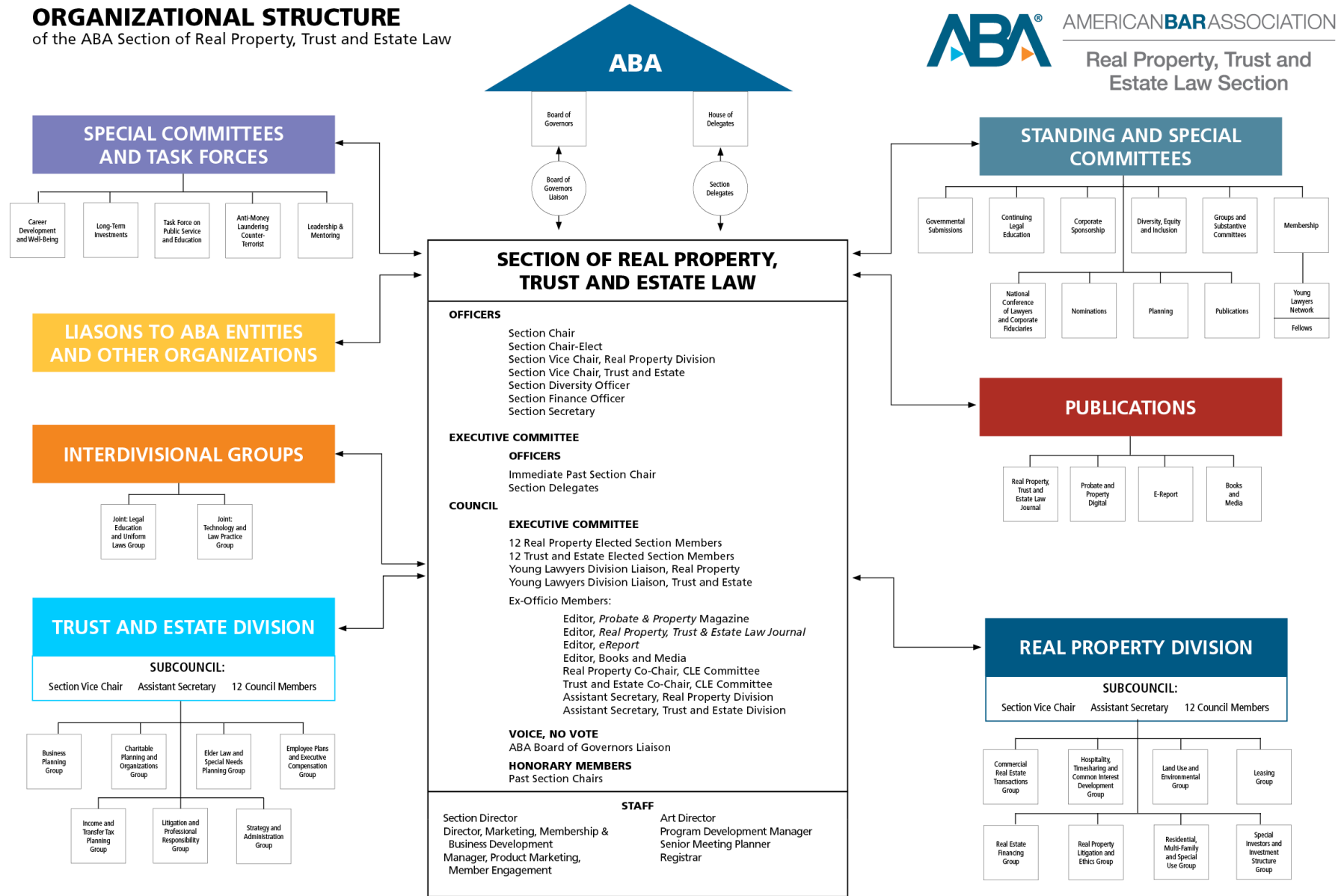


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ORGANIZATIONAL STRUCTURE

of the ABA Section of Real Property, Trust and Estate Law



SECTION OF REAL PROPERTY, TRUST AND ESTATE LAW

INTERDIVISIONAL GROUPS

Joint: Legal
Education
and Uniform
Laws Group

Joint:
Technology and
Law Practice
Group

REAL PROPERTY DIVISION

SUBCOUNCIL:

Section Vice Chair Assistant Secretary 12 Council Members

Commercial
Real Estate
Transactions
Group

Hospitality,
Timesharing and
Common Interest
Development
Group

Land Use and
Environmental
Group

Leasing
Group

Real Estate
Financing
Group

Real Property
Litigation and
Ethics Group

Residential,
Multi-Family
and Special
Use Group

Special
Investors and
Investment
Structure
Group



Real Property, Trust and
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TRUST AND ESTATE DIVISION

SUBCOUNCIL:

Section Vice Chair Assistant Secretary 12 Council Members

Business
Planning
Group

Charitable
Planning and
Organizations
Group

Elder Law and
Special Needs
Planning Group

Employee Plans
and Executive
Compensation
Group

Income and
Transfer Tax
Planning
Group

Litigation and
Professional
Responsibility
Group

Strategy and
Administration
Group

Commercial Real Estate Transactions Group

Design and Construction
Easements, Restrictions and Covenants
Green and Sustainable Transactions
Purchase and Sale
Title Insurance and Surveys

Hospitality, Timesharing, and Common Interests Development Group

Common Interest Development and
Timesharing
Hotel, Resorts and Tourism

Land Use and Environmental Group

Condemnation
Environmental
Governmental Incentives
Land Use and Zoning
Property Tax

Leasing Group

Assignment and Subletting
Emerging Issues and Specialty Leases
Ground Leasing
Industrial Leasing
Office Leasing
Retail Leasing

Real Estate Financing Group

Legal Opinions in Real Estate Transactions
Mortgage Lending
Workouts, Foreclosures and Bankruptcy

Real Property Litigation and Ethics Group

Ethics and Professionalism
Real Property Litigation and Alternative
Dispute Resolution

Residential, Multi-Family and Special Use Group

Affordable Housing
Multi-Family Residential
Senior Housing and Assisted Living
Single Family Residential

Special Investors and Investment Structure Group

Federal Taxation of Real Estate
International Investments in Real Estate
Land Trusts
Partnerships and Limited Liability
Companies
Real Estate Private Equity

Business Planning Group

Investment Entities
Operating Businesses
Real Estate, Agriculture, and Natural Resources

Charitable Planning and Organizations Group

Charitable Organizations
Charitable Planning
Legislative and Regulatory Issues

Elder Law and Special Needs Planning Group

Elder Law and Long-Term Care
Special Needs Planning

Employee Plans and Executive Compensation Group

Fiduciary Responsibility, Administration and Litigation
Individual Retirement Accounts and Plan Distributions
Nonqualified Deferred Compensations
Plan Transactions and Terminations
Qualified Plans
Welfare Benefit Plans

Income and Transfer Tax Planning Group

Art and Collectibles
Estate and Gift Tax
Generation Skipping Transfers
Individual and Fiduciary Income Tax
International Tax Planning
Tax Litigation and Controversy

Litigation and Professional Responsibility Group

Alternate Dispute Resolution
Professional Responsibility
Probate and Fiduciary Litigation

Strategy and Administration Group

Asset Protection Planning
Emotional and Psychological Issues in Estate Planning
Fiduciary Administration
Planning and Drafting

JOINT GROUPS

Joint Technology and Law Practice Group

**Joint Legal Education and
Uniform Laws Group**

Legal Education
Uniforms Laws



Message from Chair-Elect Kellye Clarke



Engagement

Your active engagement with the Section's activities and with your colleagues within the Section are your keys to success as a RPTE Leader, both to benefit others and for your own professional development!

- The Section Officers, Council Representative, and your Group Chairs and Vice-Chairs are there to help and mentor.
- The Chicago Staff (Robin, Monica, Khadijah, and others) are happy to set up calls and provide the ListServ and other information you need.
- The Directory lists the Officers, the Group and Committee members (the members of your Group and Committee and the others), as well as the Chicago Staff and their roles. Read it and use it!
- The opportunities for collaboration provided by your Group and Committee and by programs and projects with the other RPTE Groups and Committees.



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Being a RPTE Leader

- Create and be part of a community of lawyers that practice in your field.
- Hone your leadership and organizational skills within your Group and Committee.
- Present, and offer your Group and Committee members the opportunity to present, both informally to the Group or Committee and formally in live CLEs and eCLEs.
- Publish, and offer your Group and Committee Members the opportunity to publish, to a national audience, through Probate & Property and Journal articles.
- Attend our live meetings and network in person with other RPTE colleagues.



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This is Just the Beginning

Substantive Projects:

- CLE
- Publications
- Gov't Submissions
- their ultimate roles and responsibilities for the bar year ahead

Operational Framework:

- How to leading substantive committees and groups
- how substantive groups work with standing committees



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Diversity Equity and Inclusion

Brian Balduzzi, co-Chair, DEI Committee

DIVERSITY, EQUITY AND INCLUSION (DEI) IN THE ABA

ABA Diversity Equity and Inclusion CLE Policy

Adopted by the Board of Governors

April 5, 2022

The ABA supports proactive measures to ensure that individuals from all backgrounds are afforded fair opportunities to participate in CLE programs. All CLE programs sponsored or co-sponsored by the ABA will meet the objectives of Goal III to eliminate bias and enhance diversity.

Program organizers will invite and include prospective moderators and faculty members to create CLE panels that meet the objectives of Goal III. This includes, among others, moderators and faculty members from historically underrepresented communities e.g., racial and ethnic demographic groups/people of color, women, persons with disabilities, and LGBTQ+ individuals.

SCOCLE will create a subcommittee, which will include representatives from SOC and the Diversity and Inclusion Center. The subcommittee shall monitor the Association's CLE programming to ensure that Association entities conduct CLE programs in accordance with this policy. The subcommittee will have authority to engage and assist any ABA entities found not to be in compliance with this policy. SCOCLE shall report the subcommittee's findings at regularly scheduled meetings of the Board of Governors.

The implementation date for this Diversity Equity and Inclusion CLE Policy shall be April 5, 2022.

<https://www.americanbar.org/content/dam/aba/administrative/diversity-inclusion-center/aba-diversity-equity-and-inclusion-cle-policy-2022.pdf>

Goal III: Eliminate Bias and Enhance Diversity

Objectives:

- Promote full and equal participation in the association, our profession, and the justice system by all persons.
- Eliminate bias in the legal profession and the justice system.

https://www.americanbar.org/about_the_aba/aba-mission-goals/



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DEI IN RPTE

RPTE DEI MISSION STATEMENT

The RPTE Section is committed to creating a section that reflects the diversity of the bar association, the clients we serve, and the organizations with whom we partner, not only as they are today but as they will be in the future. Diversity, equity and inclusion are integral parts of the RPTE Section's values and mission. We are committed to nondiscrimination, anti-racism and inclusion of persons of all faiths, backgrounds, sexual orientations, gender identities and expression, and abilities. We value all of our members and strive to acknowledge their meaningful contributions to RPTE Section activities. Our goal is to ensure all members feel welcomed and valued in the RPTE Section and to provide each member with opportunities to participate fully, welcoming people with differing ethnicity, race, cultural background, religion, age, gender identity or gender expression, sexual orientation, national origin, ability, practice setting, economic situation, ideology or veteran status.

Revised February 2024



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DEI IN RPTE – Programming

- DEI Book Club
- Law School Outreach Visits
- “Walking the Walk” Program
- Review and Sponsorship of ABA Resolutions
- Partnerships with Affinity Bar Associations
- Outreach to State and Local Bar Associations
- In-Person and Virtual CLE Programs
- Partnership with Other RPTE Groups and Committees
- And More!



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DEI LEADERSHIP IN RPTE



CO-CHAIR (TE)
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Continuing Legal Education

*Marissa Dungey and Scott Schwefel, co-Chairs, CLE
Committee*

CLE Initiatives

- National CLE Conference: May 5-7, 2027, in Atlanta, Georgia
- eCLE Webinars
- Skills Training (TE) / Essentials (RP)
 - Conference/series style basics programming targeted to newer attorneys and those transitioning into the field
- Virtual CLE Conference
- Member-benefit webinars
 - Not all webinar programming has to be for CLE credit or at full price.
- Encourage collaboration with other committees and groups, including joint with TE/RP or standing committees such as DEI and LPG



Key Contacts / Source of Information on CLE

- Information available on rptefall.com:
 - CLE Guidance for 2026-2027
 - Request for Proposals (RFPs) for National CLE Conference and eCLE Webinars
- CLE Chairs and Vice-chairs:
 - Scott Schwefel (RP CLE Chair), scott@shipmanlawct.com
 - Sarah Cline (RP CLE Vice-Chair), scline@milesstockbridge.com
 - Marissa Dungey (TE CLE Chair), marissa@dungeydougherty.com
 - Bruce Tannahill (TE CLE Vice-chair), bruce.tannahill@gmail.com
- National CLE Vice-chairs:
 - RP: James Slaton and Ben Kelley
 - TE: Alex Tanouye and Molly Depew
- eCLE Vice-chairs
 - RP: Stephen Linde
 - TE: Nathan Catanese and Rick Mills





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Publications

*Michael Sneeringer and Jeff Hopkins, Co-Chairs,
Publications*

Publications Committee

- Probate & Property Magazine
- ABA Real Property, Trust & Estate Law Journal
- RPTE Section's Books & Media
- Law Student Writing Competition
- eReport is currently on pause



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Probate & Property Magazine

- Bimonthly magazine publication (transitioning to electronic only)
- Article topics vary from broad introductions helpful to lawyers working on a task or matter that is new to them, to advanced analyses of specific issues, to cutting-edge reports on new developments
- Approximately 1,500 to 5,000 words per article (but longer is fine too)
- Submit TE articles to William Kelleher (“Bill”), wkelleher@gfmlaw.com (with a cc to Michael Sneeringer (masneeringer@bmdllc.com)); submit RP articles to Kathleen Law, kklaw@nyemaster.com



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ABA Real Property, Trust & Estate Law Journal

- Scholarly publication in a law-review format, co-edited with a student editorial board at the University of South Carolina School of Law
- Topics include real property, estate planning, probate, and trust law, as well as the related fields of environmental law, ERISA, insurance, and bankruptcy
- Typical article length: 30-40 pages with 100 to 200 footnotes, but articles can range from 10 to over 100 pages
- Submit through Scholastica or by email to rptej@law.sc.edu. You may also direct any questions to Editor Amy Milligan, milligal@law.sc.edu



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RPTE Section's Books & Media

- Publishes advanced materials geared towards expert practitioners on current topics related to both the real property and trusts and estates sides of the Section
- Most of the books provide forms and other valuable tools for the practitioner
- Many authors are nationally recognized speakers and thought-leaders on their topics, and others have the opportunity to gain such national recognition
- Interested authors should contact Books Editor Carolyn Vinson, CPVinson@Venable.com
- The Real Property Book board has an opening. If interested, please contact Books Editor Carolyn Vinson, CPVinson@Venable.com



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Law Student Writing Competition

- Section sponsored to encourage J.D. and LL.M student scholarship in the subjects of real property law and trusts and estates law
- Annually recognizes up to three contest winners, and among other prizes, prize-winning entries may be recommended for publication in the Journal
- Section members serve as Contest judges, and they review around 3-8 articles between the contest deadline on May 31st and the judging deadline of August 31st
- The Contest panel is looking for one or two faculty judges who teach Trusts and Estates. If interested, please contact the Contest's coordinator Mike Ostermeyer, ostermeyerm@ballardspahr.com



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Questions?

- Please contact:
 - Michael Sneeringer, masneeringer@bmdllc.com
 - Jeff Hopkins, jeff@basjlaw.com



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Government Submission Committees & Coordination with Internal and External Groups

RP Chair: James Slaton, Stone Pigman Walther Wittmann L.L.C

TE Chair: William LaPiana Dean of Faculty Rita and Joseph Solomon Professor of Wills, Trusts, and Estates New York Law School

What do the Trust and Estate Government Submissions Committee (TEGS) and Real Property Government Submissions Committee (RPGS) do?

- TEGS and RPGS review proposed submissions to governmental bodies regarding proposed legislation, regulation projects and other matters affecting legal areas within the scope of their respective RPTE Divisions, with the view to improving the law and ensuring the highest quality and balanced approach.
- TEGS reviews all TE Division comments, and RPGS reviews all RP Division comments.
- Groups and their committees are responsible for substantive comments.



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How do government submissions fit within RPTE's Strategic Plan?

- Positioning the Section to be a leading voice in the areas of law served by the Section.
- Provide leadership in improving the areas of law served by the Section.
- Providing expertise and guidance to decision makers, governmental agencies and other ABA constituencies to shape the law in areas of law served by the Section for the benefit of the public and the profession.



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What is the ABA's procedure for submitting comments?

- The ABA's Blanket Authority process is designed to allow ABA sections and divisions to present statements within their particular expertise to appropriate government agencies.
- The two procedures through which Sections (including RPTE) may submit comments through the Blanket Authority Policy are through **Technical Comments** and **Regular Blanket Comments**.



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Technical Comments

- The first procedure, “technical comments,” is granted by the ABA Board of Governors and allows a Section to submit comments on an ongoing basis to a specified governmental agency on specified subject matters.
- The grant of technical comment authority is for three years, but subject to rescission by the Board of Governors at any time, and the grant of such authority may be renewed for additional three year terms.
- While the technical comments procedure may not require notice to, and an opportunity to comment or object by, other ABA sections, divisions and offices, the ABA Section on Taxation (the “Tax Section”) and the RPTE Section have agreed informally to send the other section a copy of any submissions affecting substantive areas in which the interests of the Tax Section and the RPTE Section overlap.
- Ideally, the section seeking to comment should contact the reviewing section as early as possible in the process of developing the submission, to foster cooperation and collaboration and to avoid duplication of efforts.



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Regular Blanket Authority

- The second procedure, “regular blanket authority,” requires the Section to submit its proposed comments to other ABA sections, divisions and offices (as determined by the ABA), that, in turn, have the opportunity to comment and/or object to the proposed comments.
- The proposed comments may be submitted only if no objection is raised by another ABA entity.
- Submission to Congress or any congressional committee on proposed legislation may only be made through the regular blanket authority process.
- Typically, the “regular blanket authority” procedure applies to (i) comments or statements that touch on broad policy rather than being technical in nature, and (ii) all comments to governmental bodies other than those for which the RPTE Section has been granted technical comment authority.



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TEGS Technical Commenting for Agencies

- United States Department of the Treasury, including without limitation, the Internal Revenue Service
- United States Department of Labor
- Pension Benefit Guaranty Corporation



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RPGS Technical Commenting Authority Agencies

- Federal Energy Regulatory Commission
- Department of Housing and Urban Development
- Army Corps of Engineers
- Department of Transportation
- Department of Veterans Affairs
- Environmental Protection Agency
- Consumer Financial Protection Bureau
- Department of Treasury (implicitly includes the IRS)



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RPTE Section Process to Submit Comments and Coordination with Groups

1. Obtain link to comments request and determine when comments are due
2. Confirm interest in topic with Group Chair
3. Inform RPTE Staff Director of upcoming deadline to ensure time for ABA final approval and coordinate with staff director to determine timeline for submission to ABA Executive Committee
4. Assemble team and parcel out topics
5. Compile and prepare draft at least 30 days before deadline



RPTE Section Process to Submit Comments and Coordination with Groups (cont'd)

6. Submit first complete draft to Committee Chair; incorporate comments
7. Submit second draft to Group Chair; incorporate comments
8. Submit third draft to COGS; incorporate comments; run fourth draft by Group Chair with redline
9. Submit fourth draft to RPTE Executive Committee at least 5 days before deadline; incorporate comments
10. Submit final draft to RPTE Chair for signature
11. Coordinate with RPTE Chair and RPTE Staff Director to get signed Comments project submitted to Treasury website



Example of Section Comment from TEGS

Comments to IRS Notice 2017-73 relating to donor advised funds and Internal Revenue Code Sections 4966, 4967 and 4958

Previous Comment Letters can be found at the following link:

https://www.americanbar.org/groups/real_property_trust_estate/policy/



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Example of Section Comment from RPGS

Comments prepared by RPTE's Working Group on Anti-Money Laundering/Counter-Terrorist Financing Efforts Affecting Lawyers re: Treasury Department's Financial Crimes Enforcement Network ("FinCEN") request for public comment on the notice of proposed rulemaking regarding anti-money laundering regulations for certain non-financed residential real estate transfers.

Previous Comment letters can be found at the following link:

https://www.americanbar.org/groups/real_property_trust_estate/policy/



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Conclusion

- TEGS and RPGS are here to help!
- Please look for commenting opportunities and bring them to us!



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Questions?



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Groups and Substantive Committee (GSC)

Lisa Page and Phil Hirschfeld, Co-Chairs of GSC

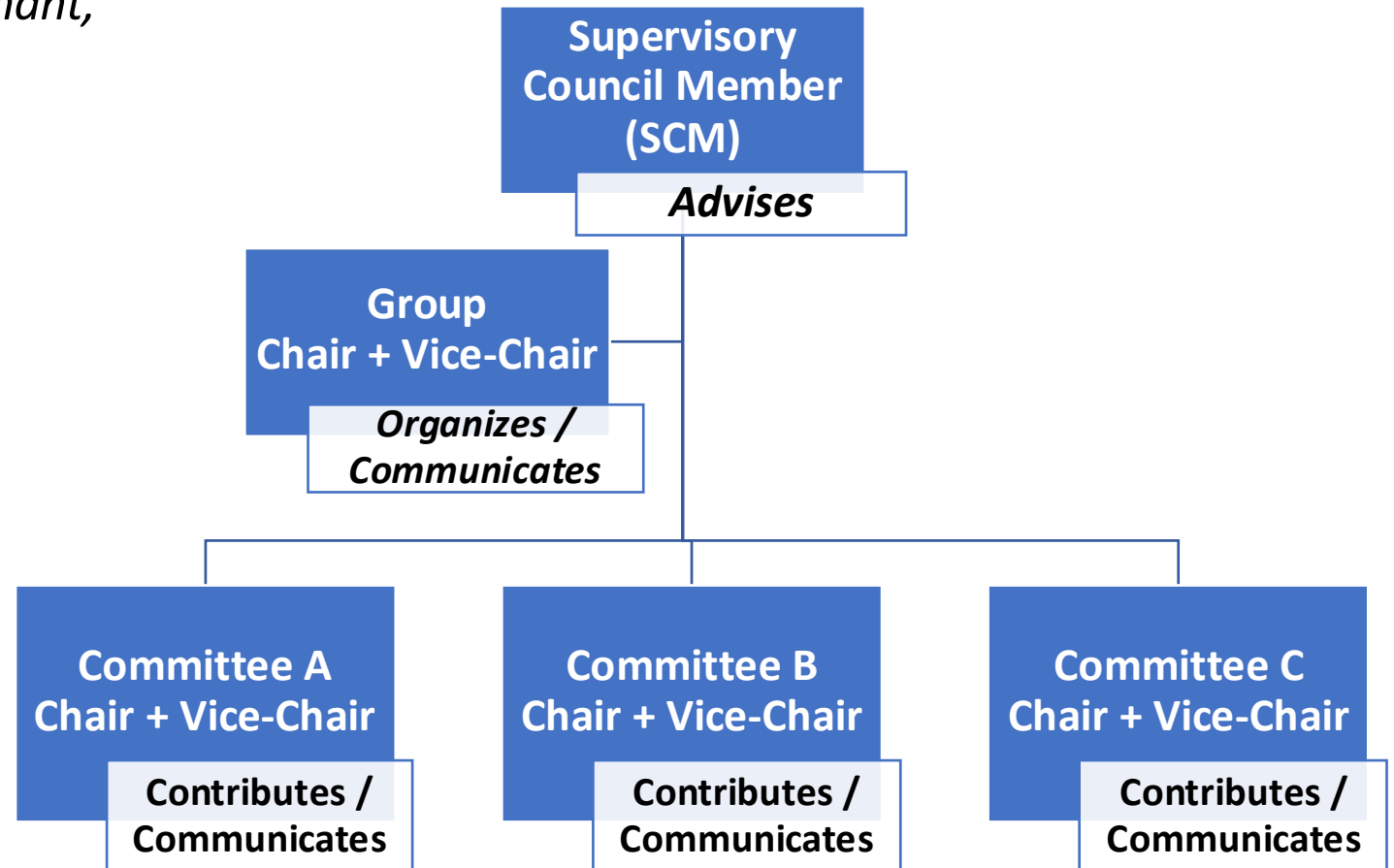
Lori Oliphant, Vice Co-Chair of GSC

Leadership Structure

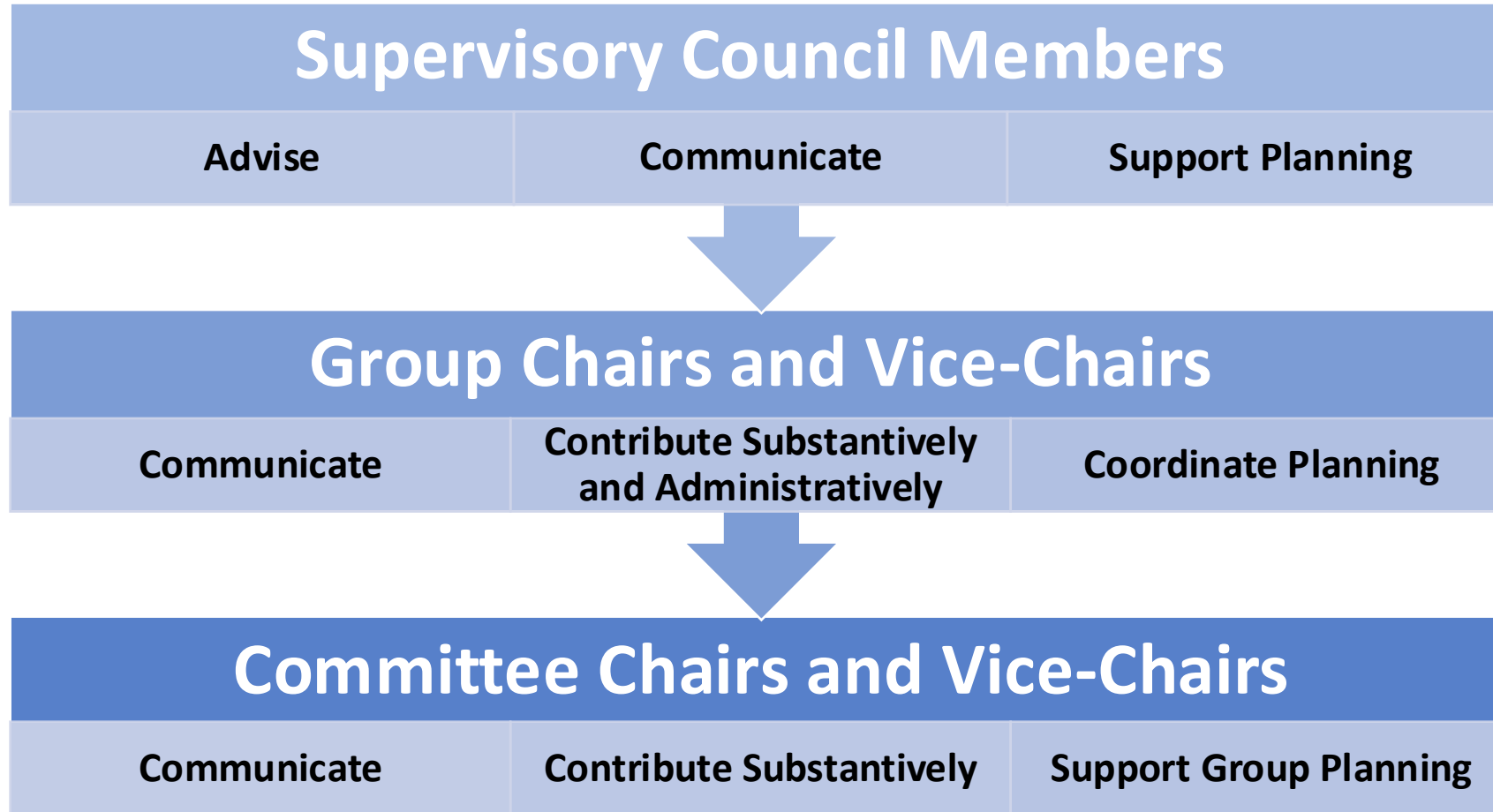
*Lisa G. Page, Phil Hirschfeld, Lori Oliphant,
co-Chairs and vice-chair, GSC*

These are the Group and Committee leadership levels and how they fit within the Group structure.

Tip: Look for the org chart on www.rptefall.com.



Leadership Roles and Responsibilities



Group + Committee Leaders' Responsibilities

Communicate

- Email (listservs)*
- Schedule calls

Plan

- Admin / Subst Calls
- Business Plan
- CLEs + eCLEs
- Publications
- Gov't submissions
- Promote DEI

Succession Planning

- Get to know members
- Identify members' skills and set them up for success
- Foster community

Don't hesitate to delegate - *Be clear on follow through needed/expected*

*See Monica to obtain listserv addresses -
Monica.Larys@americanbar.org



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Road Map: Your Group's Business Plan

What's included in the Business Plan?

What is the Group Business Plan?:

Framework and time-line for the Group and its Committees to organize their work for the year.

When is the due date:

November 6, 2026.

- **Group/Committee substantive calls:** Discuss current developments, interesting topics
- **Committee level expectations:** Outline contributions for the Bar year
- **National CLE Conference Programming:** Each Group is expected to submit a proposal for the National Conference
- **eCLE Proposals:** There are webinars presented throughout the year. Contact the CLE Committee with topic proposals.
- **Writing Projects:** RPTE publishes books, a bi-monthly magazine, Probate & Property; a scholarly journal (3 issues per year), and Real Property, Trust, and Estate Law Journal.
- **Collaboration:** Include any opportunities to collaborate with other ABA or RPTE groups and Committees.
- **Government Submissions:** Include information on whether your Group or one of its Committees will be preparing comments on proposed regulations or legislation.
- **Member and Leadership Development:** Each Group should have a plan for engaging its members, identifying those interested in leadership positions, and facilitate succession planning. Identify how your Group will work with the Fellows.



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Working with Fellows

Each year, RPTE selects a new group of talented early-career attorneys for our Fellows program—a unique two-year experience designed to foster leadership, and professional growth.

Fellows have practiced for less than 10 years or are under the age of 35, or both!

Fellows are intentionally assigned to a Group/Committee.

Leaders should:

- Welcome their assigned fellow
- Stay engaged with their fellow.
- Ensure they have work assignments, including writing and speaking engagements.



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Wrap-Up

Quarterly Subcouncil/Division Quarterly Calls (Group Chair or Vice Chair must attend and report). The calendar invitations have been sent for these remote meetings:

Trusts and Estates At 4:00 pm (eastern) online	Real Property At 4:00 pm (eastern) online
• October 14th • January 17th • April 7th • July 14th	• October 22nd • January 28th • April 16th • July 22nd

Fall Leadership Meeting:

Date: October 28-30th, 2026

Location: Four Seasons Hotel Los Angeles at Beverly Hills, California

National CLE and Leadership Conference:

Date: May 5-8th, 2027

Location: Loews Atlanta Hotel, Atlanta, Georgia



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Resources

Pro Tip: Go to www.rptefall.com for

- ✓ Business Plan
- ✓ RFP templates
- ✓ DEI Plan
- ✓ Group/Committee Guidance Documents
- ✓ RPTE Org Chart
- ✓ RPTE Directory
- ✓ + MORE

Check out *Schedule A* to the Guidance Documents with “Actionable Items and Events”



SCHEDULE A ACTIONABLE ITEMS AND EVENTS FOR GROUP LEADERS

Month	Task
September	• Be informed and attend, as applicable: • New Leader Training on September 8th at: 12:30 – 1:30 (eastern) / 11:30 – 12:30 (central) / 10:30 – 11:30 (pacific). • What’s New Information Session for all RPTE Leaders on September 10th at: 12:30 – 1:30 (eastern) / 11:30 – 12:30 (central) / 10:30 – 11:30 (pacific). Please email Monica Larys if you have not received a calendar invitation for these trainings (monica.larys@americanbar.org). • Establish communication with your Group’s Committee Chairs and Vice-Chairs and set up communication protocols for Group members, such as welcome emails (sample templates available from ABA staff) and listservs for your Group (contact Monica Larys). • Set the Group’s Bar year goals, schedule the Group’s administrative calls (for leadership-only), and the substantive calls (for full-membership) for the Bar year. Contact Monica Larys to calendar the dates and send invites. • Confirm with each Committee Chair and Vice-Chair their responsibilities, succession-planning status, Business Plan role, call expectations, welcome-email duties, and the importance of connecting with ABA staff to find support in communicating widely to membership Committee announcements. • Start developing the Group’s Business Plan with your Committee leaders and SCM. It is due no later than November 6, 2026. Start working on your Business Plan in early



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*Thank
you!*



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