

## 38th Annual Accredited CLE Event

# Stay Ahead in a Rapidly Changing Legal & Digital Landscape

Staying ahead of AI, automation, and next-generation tax and legal platforms isn't optional anymore. Firms that adapt will create clear differentiation, deliver greater client value, and thrive in an increasingly complex environment.

We are proud to present the **38th Annual Accredited CLE Update**, a premier continuing legal education event designed to empower legal professionals with the insights, tools, and strategies needed to stay at the forefront of change. This year's program brings together thought leaders, practitioners, and innovators to explore cutting-edge developments—from digital assets and tokenization to evolving compliance, tax, and regulatory frameworks.

Whether you're a seasoned attorney, advisor, or emerging practitioner, this year's CLE Update offers timely, practical knowledge to help you navigate today's challenges and seize tomorrow's opportunities. Earn your accredited credits while gaining actionable expertise that positions you — and your clients — for success in a rapidly transforming legal and financial world.

Visit [www.accreditedcle.com](http://www.accreditedcle.com) to learn more and reserve your spot.

## Event Details

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**Breakfast & Check-In:** 7:30 – 8:00 AM

**Presentations:** 8:00 AM – 12:00 PM

### Carver Financial Services

7473 Center Street, Mentor, OH 44060

**Cost:** \$50 (includes breakfast)

**Credit:** 4 CLE hours (1 Professional Conduct)

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# AGENDA:

To read the speakers bios please visit:  
<https://accreditedcle.com/speakers/>

## 8:00 - 9:00 AM | Navigating the Current Economic and Legislative Landscape: Preparing for 2026 and Beyond

Over the past year, there has been a significant shift in the economic, legislative, and legal environment—culminating in what many are calling One Big Beautiful Bill. This program will provide attorneys with an essential update on the current economic and political climate, with a focus on what these changes mean for both attorneys and their clients.

**Randy Carver, CRPC®, CDFA® | President & CEO, Carver Financial Services, Inc. RJFS Registered Principal**

## 9:00 - 10:00 AM | Protecting Clients from Tax Traps: Rethinking Buy-Sell Agreements Post-Connelly

The U.S. Supreme Court's recent decision in *Connelly v. United States* has reshaped the landscape of entity buy-sell agreements, creating new challenges and considerations for attorneys advising business owners. This program will provide a clear, practical analysis of how the Court's ruling impacts succession planning, estate valuation, and the use of life insurance to fund redemption agreements.

**April Caudill, JD, CLU, ChFC, AEP (Distinguished) | Director of Business and Advanced Solutions at the Principal Financial Group**



## 10:00 - 11:00 AM | AI & eDiscovery

More than a decade ago, Magistrate Judge Andrew Peck's landmark ruling in *Monique Da Silva Moore v. Publicis Groupe* established predictive coding (AI) as an acceptable method for identifying relevant electronically stored information (ESI). Since then, artificial intelligence workflows in eDiscovery have advanced considerably, yet attorney adoption has been slower than anticipated. This one-hour program is designed to help attorneys understand what AI is, how it works, and how it can be effectively applied in the discovery process. By focusing on an "evidence first" methodology, participants will learn practical ways to identify critical information early, prioritize review, and eliminate non-relevant materials—leading to greater efficiency, lower costs, and stronger litigation outcomes. This course is submitted for 1 hour of Professionalism CLE credit. The session emphasizes the attorney's role in ensuring that the use of technology, including AI, aligns with the highest standards of ethics and professionalism as outlined by the Ohio Rules of Professional Conduct, A Lawyer's Creed, A Lawyer's Aspirational Ideals, and the Statement Regarding the Provision of Pro Bono Legal Services by Ohio Lawyers, adopted by the Supreme Court of Ohio.

**Randy Carver, CRPC®, CDFA® | President & CEO, Carver Financial Services, Inc. RJFS Registered Principal**



## 11:00 - 12:00 PM | Digital Assets and Tokenized Real-World Assets in ETFs: Understanding the Technology, Product Structures, and Evolving Regulatory Frameworks

This accredited CLE course is designed specifically for attorneys seeking to deepen their understanding of digital assets and their growing role in modern financial markets. The session will explore the fundamentals of digital and tokenized real-world assets, as well as ETFs and ETPs that hold or reference these assets, providing participants with a clear view of how these instruments are structured, traded, and regulated.

Attendees will gain practical insight into the underlying blockchain and tokenization technologies, the different product structures emerging in this space, and how these technical distinctions drive regulatory interpretation and treatment under current U.S. and international frameworks. The program will also draw comparisons to the regulatory structure of traditional ETFs, highlighting key similarities, differences, and the implications for legal practitioners advising clients in financial, corporate, and compliance contexts.

By the end of the course, participants will not only understand the core mechanics of digital assets and tokenized products but also the evolving regulatory landscape shaping their adoption — earning accredited Continuing Legal Education (CLE) credit while enhancing their ability to counsel clients in an area of increasing legal and financial significance.

**Ryan Louvar, Chief Legal Officer and Head of Business and Legal Affairs, Digital Assets, WisdomTree**



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**Presentations:** 8:00 AM – 12:00 PM

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**Cost:** \$50 (includes breakfast)

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