Minnesota State Bar Association
Continuing Legal Education

The 37th Annual

Probate & Trust Law

Section Conference

Co-sponsored by *First Lawyers Trust Company • Lowry Hill Northern Trust • The Private Client Reserve of U.S. Bank U.S. Trust, Bank of America Private Wealth Management Securian Trust Company, N.A.*

Featuring

Ronald D. Aucutt
New Estate and Gift Tax and What Lies Ahead

Julie K. Kwon
GST Changes and Planning

Deborah Tedford
Social Security Issues We All Need to Know

Timothy J. Leach and John M. De Clue
Economic and Investment Outlook

New Law

- New estate and gift tax law and developments
- Cases, statutes, regulations and practice developments
- New rules on portability
- MA update 2011
- 2011 legislative update
- New definition of "children"

More great sessions! With new added BONUS – Ethics Session!

- 40+ sessions
- Drafting topics including: 10 drafting tips from the probate code, drafting supplemental and special needs trusts, drafting tips for multi-generational and non-traditional cohabitation
- Decanting considerations, estate tax primer, completing a 706 return, advanced care planning, cemetery issues, selecting and working with trustees
- A chance to network with over 700 of your colleagues
- A terrific set of materials fully searchable on CD-ROM
- And much, much more!

Monday & Tuesday, June 6 & 7, 2011
Saint Paul RiverCentre

Day 1 Schedule – Monday, June 6, 2011

7:00 – 7:55 a.m. REGISTRATION & CONTINENTAL BREAKFAST
Sponsored by Northern Trust

7:55 – 8:00 a.m.

Welcome and Introduction
– *Susan J. Link, Probate & Trust Law Section Chair*

8:00 – 9:00 a.m.

The Federal Estate Tax Law: Six Months of Reflection and Two More Years of Uncertainty
Six months after President Obama announced "the framework of a deal" that gave us the 2010 and 2011–2012 estate tax law, this presentation will look at what the Tax Act of 2010 settled and what it stirred up, and the challenges and opportunities for both estate planning and trust and estate administration as we face still another sunset and the prospects of the Tax Act of 2010+2.
– *Ronald D. Aucutt*

9:00 – 10:00 a.m.

The Minnesota Estate Tax Going Forward – "Putting Humpty Together Again" (continued)
Issues will include: Filing Minnesota estate tax returns for decedents, including latest developments, filing forms, obtaining extensions for filing and for paying Minnesota estate taxes, and (if applicable) whether any federal law changes will affect 2010 Minnesota filings; Handling QTIP elections in Minnesota, given the 2010 legislative changes to Minn. Stat. 291.03 subd 1b; Minnesota estate taxes for decedents dying in 2011 and after. How federal law changes affect interpretation of existing Minnesota estate tax statutes.
– *Terry L. Slye*

10:00 – 10:25 a.m. NETWORKING BREAK & EXHIBITOR BINGO

10:25 – 11:25 a.m.

Hey Bubbie, Can You Spare $5 Million? GST Tax Exemptions, Allocations and Elections
Recent legislation has expanded GST tax provisions... but only for 2 years. This program will provide an overview of prospective GST tax planning opportunities and open questions under the new law, common pitfalls in GST tax planning and compliance, possible means of addressing prior mistakes, and the potential effects of the sunset of GST tax relief provisions as of 12/31/12.
– *Julie K. Kwon*

11:25 a.m. – 12:25 p.m.

Little Known Facts About Social Security That Attorneys Ought to Know (For Ourselves as Well as Our Clients)
The basic structure of social security; retirement, disability and survivor's benefits; the three different retirement ages; early, full and delayed; consequences of choice; strategies for optimizing retirement benefits for individual circumstances; and why social security disability can be important for your client's special needs children.
– *Deborah Tedford*

12:25 – 1:30 p.m. INSTITUTE LUNCHEON
Sponsored by First Lawyers Trust Company

1:30 – 2:30 p.m. BREAKOUT SESSION A

1. **Cohabitation Considerations – Generations Under One Roof**
Issues (legal and non-legal) arising from cohabitation; review potential risks in the context of estate and medicaid planning; explore current caselaw; and potential planning options for attorney to review with clients contemplating these arrangements.
– *Mary Frances Price*

2. **Partnership Income Tax**
What trusts and estates practitioners should know about the Code §754 election – the authority to make it, how it's made, when it's filed, what it does, and why it matters under Code §§743(b) and 734(b).
– *Robert F. Collins*

3. **Advising Clients Regarding Regarding Residency Changes**
How to advise clients regarding residency changes; strategies for getting clients to understand the differences between physical presence residency and domicile. What to do in the event a client's residency status is audited. Includes analysis of Minn. Stat. 290, R 8001.0300 and *Sanchez*.
– *Thomas R. Muck & Masha M. Yevzelman*

4. **Personal Decisions Made By a Guardian for the Ward**
Can the guardian stop a marriage or start a divorce? Can a guardian restrict visitation with a spouse? What is supervisory power? These questions and other may be answered. Scope of powers; legal tests and criteria when exercising supervisory powers.
– *Robert A. McLeod*

5. **Dealing with Creditor Claims and the Insolvent Estate**
Commonly found issues relating to insolvent estates; technical requirements of administering an insolvent estate; review of submission, allowance/disallowance of creditor's claims; the need and process related to Court approval of claims; through closing.
– *George E. Warner, Jr.*

6. **The Top 10 Things Every Estate Planning Attorney Should Know About Family Law**
What you need to know about: property division and nonmarital tracing issues; spousal maintenance; child support; obligations of the divorce decree that survive the death of the obligor; and the divorce process and settlement options for clients.
– *Cathy E. Gorlin*

7. **Decanting Irrevocable Trusts: State Law and Tax Considerations**
Due to changed circumstances, estate planners are often faced with the problem that irrevocable trusts no longer meet their clients' objectives and the beneficiary's needs. A growing number of states now explicitly allow a trustee to appoint the assets of an irrevocable trust (referred to as "decanting"). This session will explore some of the state law considerations and options for decanting irrevocable trusts and highlight some of the underlying tax considerations.
– *Dana M. Neu & Karen N. Sandler Steinert*

8. **Special Assets Held Inside Trusts**
Special assets defined; issues special assts held in trusts present for trustees; due diligence required when holding special assets in trusts; issues for endowments and foundations that hold special assets and whether dynasty trusts are good candidates for holding special assets.
– *Denver S. Gilliand*

9. **Representing Estates in Tax Disputes – Death and Taxes... Where's the Certainty?**
Appraisal issues; overview of the audit process – the do's and don'ts; the administrative appeals process; benefits of protective refund claims; and tax court litigation/refund litigation forums.
– *Sue Ann Nelson & Robert J. Stuart*

2:30 – 2:45 p.m. BREAK

2:45 – 3:45 p.m. BREAKOUT SESSION B

10. **10 (or More) Sections of the Probate Code Every Scrivener Must Be Familiar With**
Sections of the Minnesota Probate Code that affect construction of wills; the statutory meaning of words and phrases frequently used in wills; the statutory default rules that may influence the construction of wills, a review of sample terms and phrases. (Minn. Stats 524.2 – 712 and 291.03)
– *James T. McNary*

11. **Elder Law Mediation: Possibilities and Pitfalls**
There is growing interest in the field of elder law mediation. When disputes arise involving elders' living situation, medical care, assistance with activities of daily living, and/or finances, it is often in everyone's interest to resolve these issues without resort to the courts. On the other hand, for the elders involved, their lives, rights, and well-being are at stake. How can elders' interests be protected, family and caregiver relationships be preserved, and communications be improved, while conserving elders' resources? Elder law mediation may provide a welcome alternative to elders, families, and care providers struggling with these issues. In this session, we will describe the growing need for elder law mediation, the crucial training, expertise and resources that elder law mediators must have, and important ways to ensure that the well-being of elders involved in elder law mediation is protected.
– *Jessie S. Ware & Jennifer L. Wright*

12. **Estate Tax Primer**
This breakout session is designed to introduce the basics in preparation and filing of the federal estate tax return based on a 2009 tax filing. Topics covered will include: an in-depth discussion of asset identification and valuation; income in respect of a decedent; valuation of partnership interests, LLC's and other non-marketable assets; use of appraisers and appraisals; alternate valuation; identification of deductible expenses and determination of whether to take them on estate or fiduciary income tax return. If time permits, this breakout session will include the assembly and filing of the return, both with the IRS and Minnesota Revenue.
– *Kathi A. Kodadek*

13. **The Importance of Trust Situs**
Situs tax benefits; the need for court supervision or involvement, asset protection, beneficiary accountings; and trust modification, including unitrust conversions.
– *P. Daniel Donohue*

14. **Antenuptial Agreements in Depth – Practical Tips and a Review of a Form Agreement**
The legal issues surrounding antenuptial agreements; practical advice regarding negotiating and drafting.
– *Cameron R. Seybolt*

15. **Beneficiary Designation**
Naming minors as beneficiaries, naming a trust as a beneficiary of qualified plan assets, creditors rights for beneficiary designated assets, revocation in the event of divorce, using a POA in connection with beneficiary designations, factors to consider when naming an estate as a beneficiary, naming minors as beneficiaries.
– *Jennifer A. Lammers*

16. **The Hurt Locker: Defusing the Retirement Account Bomb with a Charitable Gift**
IRAs and qualified plan accounts afford special opportunities for charitable giving – both during life and at death. Qualified Charitable Distributions of IRAs are the best way to make a lifetime charitable gift in some cases, but not all. We will discuss several profiles. Because tax-favored retirement accounts carry potential income tax liability at the owner's death, they are typically the best asset to leave to charity. This session will discuss implementation of outright charitable gifts of these accounts at death. We will also compare ways the owner can use such an account to provide for a surviving spouse, and make a gift to charity.
– *Robert E. Harding & Sheryl G. Morrison*

17. **Portability for the Estate Tax Exemption – Maybe You Can Take It with You When You Die (At Least for Two Years)**
The new rules relating to the portability of the estate tax exemption; how to approach estate planning situations given the new portability rules; uncertainties and unresolved issues regarding the portability rules.
– *Barry J. Newman*

18. **Clawbacks, Porting & Planning: Your Large Estate Panel's Ponderings**
(2-hour session)
The Panel poses positions, predicts and pontificates on perplexing planning and practice problems. Is the potential clawback probable and how do we prepare clients for that possibility? To what extent is portability planning preferred? How do we prepare for the portending uncertainty in 2012? Pose your questions to the panel in advance to Alan Yanowitz at Alan@mnestateplanning.com.
– *John R. Bedosky, Mark W. Greiner, E. Burke Hinds, Charles (Chip) T. Parks, Jr. & Alan J. Yanowitz*

3:45 – 4:00 p.m. BREAK

4:00 – 5:00 p.m. BREAKOUT SESSION C

18. Clawbacks, Porting & Planning: Your Large Estate Panel's Ponderings (continued)

19. **Medical Assistance Update 2011**
To close a budget deficit expected to exceed $6 billion for the biennium, the 2011 Legislature began the year looking for substantial savings in the Health and Human Services budget. Since July 1, 2008, federal law has frozen the "standards, methodologies and procedures" used to determine eligibility for medical assistance benefits. In the midst of the projected budget deficit, Minnesota has committed to expansion of medical assistance benefits to include 98,000 adults with no children and income no greater than 75% of federal poverty guidelines. This presentation will discuss the Legislature's solutions to this dilemma and provide the usual updating of medical assistance eligibility standards and estate recovery developments.
– *Julian J. Zweber*

20. **Working Through a Scenario in Completing a 706 Tax Return**
This breakout session is designed to put into practice the topics discussed in the previous session or for those who have some knowledge of the estate tax return and are looking for a refresher course. This session will take a case scenario, based on a 2009 tax filing, and walk you through the actual preparation and filing of an estate tax return in the following scenarios: a fully maritalized estate; an estate with tax due; and an estate subject to disclaimer. Also included in this session is the preparation of the Exhibit Schedule which provides the required back-up for filing of the federal estate tax return. If time permits, there will be some discussion of the preparation and filing of the Minnesota estate tax return.
– *Kathi A. Kodadek*

21. **Local Efforts in Advance Care Planning**
Kent Wilson, MD, Medical Director of Honoring Choices Minnesota (HCM) will talk about Honoring Choices Minnesota and it collaborative, community-wide public health initiative led by the Twin Cities Medical Society. The goal of Honoring Choices Minnesota (HCM) is to assist health care organizations and community partners with the installation of a comprehensive advance care planning program. Edward Ratner, MD, Medical Director, Heartland Health Care and Hospice, Roseville, MN will discuss POLST, "Provider Orders for Life Sustaining Treatment", which is a signed medical order form for patients diagnosed with serious illness, that communicates the patient's end-of-life healthcare wishes to other health care providers during an emergency. Dr. Ratner will also present his thoughts on Minnesota's need for POLST.
– *Edward Ratner, MD, Kent Wilson, MD & Kristine E. Mullmann, moderator*

22. **Cemetery/Life Estate/Burial Issues/Cemetery Issues**
– *Jane F. Godfrey & Robert W. Mairs*

23. **Domestic Violence: the Skeleton in the Client's Closet – How to Find Out and Why It Matters to Your Practice**
Domestic violence continues to pervade families, and creates acute concerns for attorneys engaged in estate planning and probate administration. Through the use of hypothetical scenarios and group discussion participants will develop the ability to identify coercive controlling violence between couples and understand how devastating it is to their clients in this legal context. Specific tools and strategies will be explored in this largely unchartered area of discussion.
– *Shuree Arett, Mary Louise Fellows, Jerry Krause & Kristine A. Lizdas*

24. **Working With and Selecting Trustees: Insights From the Trenches**
Factors to consider in selecting a trustee; advantages and disadvantages of individuals and corporate trustees; analyzing the costs and benefits of various alternatives – the best of both worlds.
– *Michael P. Sampson*

25. **Raiders of the Life Insurance Trust: Holy Grail or Temple of Doom? Irrevocable Life Insurance Trusts, Tax and Administration Considerations**
With the current uncertainty in the economy and in the federal tax laws, explore the possibility of an irrevocable life insurance trust to provide estate liquidity and to hedge against a possible 2013 estate tax increase. This program will dig through gift, estate, and GST tax issues, uncover tips and traps for drafting trust provisions, sift through trust administration issues, and unearth recent rulings impacting planning options.
– *Christopher J. Burns & James D. Lamm*

5:00 – 6:15 p.m.

INSTITUTE RECEPTION

Sponsored by Lowry Hill

Day 2 Schedule – Tuesday, June 7, 2011

7:30 – 7:50 a.m. CONTINENTAL BREAKFAST

7:50 – 8:00 a.m.

Annual Section Meeting

8:00 – 8:30 a.m.

An Overview of Legislation Past in the 2011 Session, and 2012 Legislative Projects and Proposals

– *Andrew M. Baese & Peter S. Hatinen*

8:30 – 9:10 a.m.

Non-Tax Case Law Update

– *Bridget A. Logstrom-Koci & James D. Linnett*

9:10 – 9:30 a.m.

Update and Overview of Potential Changes to Minnesota Trust Law in the Work of the Committee

– *Christopher B. Hunt*

9:30 – 10:30 a.m.

2011 Economic and Investment Outlook – Mid Year Update

Key economic drivers and trends; recent investment market performance and drivers; factors likely to influence investments going forward; and what we can expect from the markets over the remainder of the calendar year.

– *John M. De Clue & Timothy J. Leach*

10:30 – 10:45 a.m. BREAK

10:45 – 11:45 a.m. BREAKOUT SESSION D

26. **Wills and Domestic Partner Agreements for Non-Traditional Families**
Learn about public policy trending toward protecting rights of unmarried cohabitating persons to recover their own investments into a non-marital relationship and how to enforce unwritten agreements on how to divide assets acquired during the relationship. Can unwritten agreements be enforceable between cohabitating non-married couples despite the Cohabitation Statute? Are Domestic Partnership Agreements useful to avoid conflicts of persons dissolving their domestic partnership? Use of the Domestic Partnership Agreement to reflect the intent of the contracting parties to avoid questions about the division of assets upon the death of one domestic partner, by family members.
– *Rebecca J. Heltzer & Melissa J. Houghtaling*

27. **Death, Taxes and CEOs: Planning Perils, Pratfalls and Pointers in Executive Compensation**
The current environment in executive compensation for publicly held and private companies, the impact Dodd-Frank – changes in governance, public disclosures, reporting and taxes; wealth management challenges – including stock options, other awards/plans; diversification strategies; and SERPs plus other specialized retirement programs, and much, much more.
– *John W. Provo & Martin R. Rosenbaum*

28. **Informed Charitable Giving – Helping your Clients Give with Confidence**
Tools available for advisors and their clients to assess charities; how to help clients select trustworthy and effective charities for financial support; and how to find nonprofits they can trust to effectively carry out their legacy. Important new cases, statues, regulations, etc. Will include discussion of the reinstatement of the IRA Charitable Rollover federal legislation.
– *Richard Cowles*

29. **Disclaimers – Planning and Administration**
I.R.C. §2518 requirements compared to Minnesota requirements; use of disclaimers for planning under current tax laws; administration considerations with disclaimers under new law; tax laws and tips and traps.
– *Marya P. Robben*

30. **Family Limited Partnerships Case Law Update – FLPs are Alive and Well After the 2010 Tax Act**
Recent family limited partnership (FLP) gift and estate tax court cases; 2011 and 2012 gifting opportunities in light of the 2010 Tax Act and the $5 million federal gift tax exemption; how to structure FLPs and assignments of FLP interests in light of recent court cases; the need for a "gap in time" between FLP funding and gifting of FLP interests. Forsberg's "30/60/90 day rule"; FLP gifting and the annual exclusion – is it or is it not a gift of a present interest?; and the single member LLC and asset protection issues – the *Olmstead* problem.
– *William S. Forsberg & David B. Gollin*

31. **Supplemental & Special Needs Trusts: Just Beyond the Basics**
There isn't much that's "basic" about Supplemental and Special Needs Trusts; you have to know more than just what words to include on the form. This session will get at the shifting policies and regulations that manipulate the drafting and (especially) the administration of these invaluable tools for people with disabilities and explore when and how to use them.
– *Jeffrey W. Schmidt*

32. **Small Estates Panel – Planning, Administration and Drafting Issues**
A discussion of topics affecting those estates with a value of $500,000 – $5,000,000. Some of the topics to be addressed will be the practical implications of the new federal estate, gift and GST taxes upon the "small estate"; exemption planning and inter vivos gift strategies; life insurance planning; planning for disability; probate avoidance; and probate administration issues.
– *Elizabeth A. Garvey, James T. McNary & Trisha A. Vicario*

33. **Planning Concepts with Insurance Products – "Have It Both Ways" Insurance Planning**
Take back control of their benefits from insurance companies; how to pass desired amount of a client's estate without reducing cash flow for personal use/lifestyle; eliminate the "use it or lose it" and "die to win" mindset of insurance products; multiple purpose insurance vehicles; the dynamic and evolutionary nature of the life insurance industry.
– *Robert Cohen*

11:45 a.m. – 12:45 p.m. BREAKOUT SESSION E

34. **Cryptic Tales – A Probate Practitioner's Panel**
This panel of experienced probate practitioners will discuss basic questions that arise for attorneys and paralegals during the administration of a decedent's estate about: issues with the will; probate and non-probate assets; creditor's claims; opening and closing issues; and what to do when the family is misbehaving. If you have specific questions that you would like the panel to address or discuss, please e-mail them to vobrien@minncle.org.
– *Andrea S. Breckner, Cynthia R. Costello, Daniel R. Donovan, Jane F. Godfrey, Kathi A. Kodadek, Michael P. Sampson, Mary E. Shearen & Susan J. Link, moderator*

35. **Who's Your Daddy? Perspectives on Creative Conception and the Law**
The new definition of children under Minnesota's law, and what it covers versus what it doesn't; the impact of the new law on inheritance rights and relationships as raised by the new variety of ways in which children can come into the world including surrogacy and assisted reproduction; and how to draft estate plans that appropriately address the issues raised by creative conception methods.
– *Sonny F. Miller, Sheryl G. Morrison & Steven H. Snyder*

36. **Techn-ethics**
(1.0 ethics credit applied for)
Technology is changing so fast that it can make your head spin and advancements create new ethical complications. Trends like cloud computing and smartphones have made the practice easier, but they're also creating headaches. This seminar evaluates the ethical concerns in today's hottest techno-trends. Issues "In the Clouds" will include: cloud computing, open source software, sharing and collaboration, on-line data storage, Software as a Service (SaaS), internet-based e-mail with a description of each and an explanation of they are applied in the practice of law citing appropriate Rules, Opinions, Case-law and unresolved issues.
– *Stuart I. Teicher*

37. **"Bleak House" Revisited or How Much Justice Can Your Client Afford?**
Uniqueness of probate litigation proceedings (Remember "The rule in Shelley's case"?); importance of family history and dynamics in the litigation; many parts of litigation under the UPC; creative use of ADR and compensation for the attorney (or "Aren't you doing this for free?").
– *William G. Peterson*

38. **Family Governance and Leadership: Transitioning Family Wealth in Challenging Times**
This session introduces an innovative approach to wealth transition planning and outlines a series of practical steps that affluent families can take to ensure that they become and remain resilient, flexible, adaptable and productive, by applying disciplines from organizational communication, family governance, adult learning methodologies and behavioral finance.
– *John R. Bedosky*

39. **Florida Real Estate Planning Update and Notable Real Property Issues**
Overview of Florida tax system; steps to establish Florida domicile; Florida homesteads and related real estate issues, including documentary tax on real property transfers and save-our-homes assessed value reductions, and an update on Florida probate and trust laws.
– *Ronald A. Eisenberg*

40. **Obtaining Clearance Certificates to Resolve Medical Assistance Estate Recovery Claims**
This presentation will discuss the different situations in which a medical assistance clearance certificate must be obtained from a county or state agency to satisfy a medical assistance claim or potential claim against real property or satisfy a third party that no claim exists. Forms, procedures and practical advice for each situation will be presented.
– *Julian J. Zweber*

41. **The Corporate Trustee Isn't Coming to Dinner: Examining This and Other Advantages to Utilizing Corporate Trustees in Estate Planning**
There are several reasons to consider using corporate trustees when drafting estate planning documents. As the title of this presentation suggests, they won't be coming to dinner – meaning they can make hard, unpopular decisions without the risk of introducing strain into the family. The presentation will focus on this and other advantages to naming a corporate trustee as well as items to consider when selecting a corporate trustee.
– *Adam D. Cox & Robin R. Tutt*

12:45 p.m. ADJOURN

SPECIAL BONUS SESSION

1:00 – 3:15 p.m.

The Ethical Dangers of Social Media

(2-hour session, includes one 15-minute break)
(2.0 ethics credits applied for)
Social networking is all the rage and attorneys are participating in record numbers. But our activities in social networking have both professional and ethical repercussions. This two-hour seminar evaluates the professional and ethical pitfalls that await attorneys while involved in social networking and provides some advice for keeping on the right side of the professional and ethical divide. Analysis will include: cultivating knowledge of the law, and referencing ethics Rules: 1.1, 1.3, 5.1, 5.3. The second hour will address specific ethical issues in social networking including Rules: 1.6, 7 and address tips for safe surfing.
– *Stuart I. Teicher*

Thank you to the co-sponsors of the 2011 Probate & Trust Law Section Conference!

1st First Lawyers Trust Company
Lunch

Lowry Hill Private Asset Management
Reception

Northern Trust
Breakfast

The Private Client Reserve U.S. Bank
Speaker Ronald D. Aucutt

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Bank of America Private Wealth Management
Speaker Julie K. Kwon

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REGISTRATION / ORDER FORM

THE 37TH ANNUAL

PROBATE & TRUST LAW SECTION CONFERENCE

064-11 / vjo

June 6 & 7, 2011
Saint Paul RiverCentre
175 West Kellogg Blvd.

PLEASE "✓" APPROPRIATE BOX:

- ☐ $525 MSBA member
- ☐ $525 paralegal
- ☐ $595 standard rate
- ☐ I have a Minnesota CLE Season Pass[SM].

Pass # ____________

☐ **NEW LAWYER DISCOUNT!**
I was first admitted to the bar after June 6, 2008, and have deducted $60 from the fee above.

PLEASE "✓" BREAKOUT CHOICES:

SESSION A	SESSION B	SESSION C	SESSION D	SESSION E
☐ #1	☐ #10	☐ #19	☐ #26	☐ #34
☐ #2	☐ #11	☐ #20	☐ #27	☐ #35
☐ #3	☐ #12	☐ #21	☐ #28	☐ #36
☐ #4	☐ #13	☐ #22	☐ #29	☐ #37
☐ #5	☐ #14	☐ #23	☐ #30	☐ #38
☐ #6	☐ #15	☐ #24	☐ #31	☐ #39
☐ #7	☐ #16	☐ #25	☐ #32	☐ #40
☐ #8	☐ #17		☐ #33	☐ #41
☐ #9	☐ #18 (2-hour)			

☐ **DAY 2 BONUS SESSION**
I will be attending the Day 2 Bonus Session for 2.0 ethics credits.

PLEASE INDICATE ANY DIETARY NEEDS:

☐ Diabetic ☐ Food Allergies ____________
☐ Vegetarian ☐ Other ____________

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I cannot attend. Please send me:

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COST OF ITEM(S)	**S & H**
Single CD-ROM	$4
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SPECIAL HOTEL ACCOMMODATION RATES

Minnesota CLE has negotiated special room rates at the following hotels for attendees of the 2011 Probate & Trust Law Section Conference. Please call the hotels directly to make reservations. Be sure to mention **Minnesota CLE Probate Conference** to receive these special rates. Make your reservations early to assure room/rate availability.

- **Best Western Kelly Inn ($89)**
  161 St. Anthony Avenue; (651) 227-8711
- **Crowne Plaza – St. Paul Riverfront ($129)**
  11 East Kellogg Boulevard; (651) 292-1900
- **Holiday Inn St. Paul Downtown ($114)**
  175 West Seventh Street; (651) 225-1515
- **The Saint Paul Hotel ($145)**
  350 Market Street; (651) 292-9292

CREDITS

Minnesota CLE is applying to the Minnesota State Board of CLE for **11.5 total credits.** We anticipate that breakout session #36 will qualify for **1.0 ethics credit.** If you attend breakout session #36, you must deduct those credits from the 11.5 hours of "standard" credit. For example, if you attend breakout session #36, you would claim 1.0 ethics credit and 10.5 standard credits for a total of 11.5 credits. Additionally, Minnesota CLE has applied for **2.0 ethics credits for the Bonus Session on Day 2.** Attendees of the Bonus Session on Day 2 may claim 2.0 ethics credits. **In no case may you claim more than 13.5 total credits for the 2011 Probate and Trust Law Conference and Bonus Session.**

CANCELLATION/NO-SHOW POLICY

Paid registrants who cancel their registration at least 72 hours before the program will receive a full credit on their account; if fewer than 72 hours, a $25 administrative fee will be deducted. Paid registrants who fail to attend will receive the CD-ROM provided to attendees. Passholders may purchase the course materials at 50% of the full retail price.

ACCOMMODATION

If you have a disability and need an accommodation in order to attend this seminar, please contact Minnesota CLE as soon as possible at 2550 University Avenue West #160-S, Saint Paul, MN 55114 or call 651-227-8266 or 800-759-8840.

QUESTIONS?

Please call Minnesota CLE at **651-227-8266** or **800-759-8840.**
Or visit us on the web at **www.minncle.org.**

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