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Minnesota
State Bar
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Legal Education

2550 UNIVERSITY AVE W #160-S, SAINT PAUL MN 55114

DATED MATERIAL – PLEASE EXPEDITE!

Estate Planning

FOR THE **SMALL ESTATE**
(UNDER \$1 MILLION)

Tuesday, January 26, 2010

Video replays available.



Minnesota State Bar Association
Continuing Legal Education

Your State Bar at Work for You

Estate Planning

FOR THE **SMALL ESTATE**
(UNDER \$1 MILLION)

**DON'T MISS THIS CHANCE
TO ATTEND A REVIEW OF
EFFECTIVE ESTATE PLANNING
PROCEDURES THAT REALLY FIT
THE NEEDS OF YOUR CLIENTS
WITH SMALLER ESTATES.**

Tuesday, January 26, 2010

Minnesota CLE Conference Center
Seventh Street & Nicollet Mall
Third Floor City Center, Minneapolis

Video replay details inside.

**Our talented faculty
will provide insight into
practice issues affecting
your clients with estates
of under \$1 million.**

Topics include:

- basic estate planning concepts
- the initial client interview
*(your materials will include
a simple, no-nonsense
questionnaire and checklist)*
- creative uses of non-probate
transfers
- Transfer on Death Deeds (TODDs)
- basic medical assistance
- planning for incapacity

**Plus a panel to address
common problems and
possible solutions that come
up again and again for the
small estate.**

Schedule

8:30 – 9:00 a.m. CHECK-IN & CONTINENTAL BREAKFAST

9:00 – 10:15 a.m.

In the Beginning...Initial Estate Planning Considerations

Gathering information about client's needs and goals, interviewing, and avoiding ethical problems. Includes a simple no-nonsense questionnaire and checklist and a review of helpful online resources.

– *John D. Reep, Course Chair*
Reep Law Office PLLC; Saint Cloud

10:15 – 10:30 a.m. BREAK

10:30 a.m. – 12:00 p.m.

To Probate or Not...Understanding Probate and Using Non-Probate Options

Basic probate and intestate succession. Transferring real estate and joint tenancy. Using beneficiary designations, life insurance, joint tenancy, payable on death (POD), Uniform Transfers to Minor's Act (UTMA) accounts, and transfer on death accounts. And what you need to know about Transfer on Death Deeds (TODDs) and how to use them.

– *Jacqueline M. Schuh*
Gray Plant Mooty PA; Saint Cloud

12:00 – 1:00 p.m. LUNCH (on your own)

1:00 – 2:00 p.m.

Basic Medical Assistance

Qualifying for Medical Assistance, transfer of assets, nursing home and community spouses, homestead property.

– *Terrie M. Lewis*
Terrie Lewis Law Office PA; Edina

2:00 – 3:00 p.m.

Planning for Incapacity

Using powers of attorney, trusts, and health care directives.

– *Chad M. Roggeman*
Chad M. Roggeman Law Office; Saint Cloud

3:00 – 3:15 p.m. BREAK

3:15 – 4:30 p.m.

Common Problems and Possible Solutions

Identifying and solving some planning issues which tend to come up again and again. Practical tips and solutions, a war story or two, some brief hypothetical scenarios, and plenty of time for questions and answers from the attendees. This is not to be missed – a rollicking good time!

– *Panel discussion with faculty*
Moderated by John D. Reep

Dates & Locations

LIVE PRESENTATION

Minneapolis – Tuesday, January 26, 2010
Minnesota CLE Conference Center
Seventh Street & Nicollet Mall, Third Floor City Center

VIDEO REPLAYS

Schedule times may differ from the live program. Start times are as indicated below. Please register at least one week in advance to secure your copy of the course materials on the day of the seminar.

Minneapolis – 2/11/10
Minneapolis – 3/2/10
(Reg. 8:30; Replay 9:00)
MN CLE Conference Center
Seventh Street & Nicollet Mall
Third Floor City Center

Albert Lea – 3/19/10
(Reg. 8:30; Replay 9:00)
Christian & Peterson
314 South Broadway

Duluth – 3/11/10
(Reg. 8:30; Replay 9:00)
Radisson Hotel Duluth—Harborview
505 West Superior Street

Mankato – 3/18/10
(Reg. 8:15; Replay 8:30)
Farrish Johnson Law Office
Eastwood Industrial Centre
1907 Excel Drive

Marshall – 5/14/10
(Reg. 8:30; Replay 9:00)
Lyon County Government Center
607 West Main Street

Moorhead – 4/1/10
(Reg. 9:00; Replay 9:15)
Moorhead Public Library
118 Fifth Street South

Rochester – 2/26/10
(Reg. 8:30; Replay 9:00)
Minnesota School of Business
2521 Pennington Drive NW

Saint Cloud – 3/1/10
(Reg. 8:45; Replay 9:00)
Kelly Inn
Highway 23 & Fourth Avenue South

Virginia – 3/5/10
(Reg. 8:45; Replay 9:00)
Sipila Law Office
108 Fifth Avenue South, Suite 1

Walker – 3/12/10
(Reg. 8:45; Replay 9:00)
Cass County Courthouse
300 Minnesota Avenue
Third Floor Jury Room

General Information

CREDITS

Minnesota CLE has applied to the Minnesota State Board of Continuing Legal Education for **6.0 CLE credits**. The maximum number of credits attendees may report is **6.0**.

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.

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 do not cancel, yet fail to attend, will receive the written materials. Passholders may purchase the materials for 50% of the full retail price.

QUESTIONS?

For further information, please call Minnesota CLE at **651-227-8266** or **800-759-8840**. Or, visit us on the web at **www.minncle.org**.

Registration/Order Form

TO REGISTER:

Estate Planning FOR THE SMALL ESTATE

Tuesday, January 26, 2010

Minnesota CLE Conference Center

513-10 | Ido

PLEASE "✓" APPROPRIATE BOX BELOW:

LIVE (1/26/10):

\$195 MSBA member \$195 paralegal \$245 standard rate

VIDEO REPLAY:

\$165 MSBA member \$165 paralegal \$215 standard rate

Location _____ Date _____

NEW LAWYER DISCOUNT!

I was first admitted to the bar after January 26, 2007, and have deducted \$60 from the registration fee marked above.

I have a MN CLE Season PassSM. Pass # _____

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Program Materials

I cannot attend. Please send me:

_____ copy(ies) of the written materials at \$90 each. (available 2/2/10)

Cost of book(s) \$ _____

Shipping/Handling \$ _____

Subtotal \$ _____

Tax \$ _____

TOTAL \$ _____

COST OF BOOK(S)	S & H
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\$100.01 – 150	\$9
\$150.01 – 250	\$12
\$250.01 +	\$15
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OR CALL: Minnesota CLE at 651-227-8266 or 800-759-8840