

# Your Shortcut to Mastering 40 Key Estate Planning, Probate and Trust Law Cases!

Do you know the most important cases in trust administration, estate planning and estate administration? Are you sure?

This course follows the highly successful format of the “60” series. Analysis will include: *Margolis, Great Northern Iron Ore Props, Rev. Ruling 85-13, 2008-22, 2004-64, Crummey, Crown/Dickman, Walton, Bongard, Proctor, McKee-Johnson/Karon, Matthews, Congdon, Sangren, Stisser, Torgerson, Congdon, Reay’s Estate, Wilson’s Estate* and much, much more!

Our expert faculty will dive deep into the cases and explain the holdings and analysis as well as when decided to your advantage.



In addition to the insights of our case law experts at the course, you’ll also receive a detailed summary of each case in a specially formatted book. Each summary includes a quick recap of the facts, the holding, the author’s commentary about the case, and a list of related cases and authorities.

The book is the best way to begin your case research. The authors will ensure that you start with the right cases, answer your questions and point you in the right direction for further research.

A day full of insights – a book full of helpful case summaries and practice pointers – get both when you register for this course!

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## The Estate Planning, Probate & Trust Law 40

Friday, February 12, 2016  
Video replay dates available.

# The Estate Planning, Probate & Trust Law 40

THE 40 CASES EVERY PROBATE & TRUST LAWYER  
MUST KNOW INSIDE AND OUT



### Bonus Book!

You’ll receive a handy reference manual containing brief, easy-to-read summaries of all 40 cases.

It’s the perfect addition to your estate planning, probate and trust law library!

Simplify your legal research with 40 handy shortcut case summaries in 21 key areas in probate, estate planning and trust law. It’s the fastest way to ensure the key cases you cite actually mean what you think they mean!

**Friday, February 12, 2016**  
Minnesota CLE Conference Center  
600 Nicollet Mall, Suite 370  
Third Floor City Center, Minneapolis

Video replay details inside.

# Schedule

8:30 – 8:55 a.m.  
CHECK-IN & CONTINENTAL BREAKFAST

8:55 – 9:00 a.m.  
WELCOME & INTRODUCTION  
– Adam D. Cox & Anne (Bjerken) Paape  
Course Co-Chairs

9:00 – 9:20 a.m.  
**Trust Creation/Public Policy**  
– Carissa W. Brown

9:20 – 9:40 a.m.  
**Trust Construction**  
– Diana M. Ringuette & Julian Zebot

9:40 – 10:30 a.m.  
**Trustee Duties**  
Discretion and distribution standards (*Margolis*),  
exculpatory provisions (*Margolis*), duty to diversify,  
duty of impartiality (*Great Northern Iron Ore Props*),  
and duty to inform.  
– Matthew T. Boos, Adam D. Cox & David C. Joyslin

10:30 – 10:45 a.m.  
BREAK

10:45 – 11:05 a.m.  
**Grantor Trust Status and Disregarded Sales**  
Grantor trust status and disregarded sales (Rev. Rul 85-13, 2008-22, 2004-64).  
– Cameron R. Seybolt

11:05 a.m. – 12:00 p.m.  
**Gifting Cases**  
Gift tax annual exclusion (*Crummey*), interest  
free loans (*Crown/Dickman*), grantor retained  
annuity trusts (*Walton*), family limited partnerships  
(*Bongard*), and price adjustment clauses (*Proctor*).  
– Matthew J. Frerichs & Matthew J. Shea

12:00 – 1:00 p.m.  
LUNCH (on your own)

1:00 – 1:20 p.m.  
**Antenuptial Agreements and Spousal Maintenance Waivers**  
Antenuptial agreements and spousal maintenance  
waivers (*McKee-Johnson/Karon*).  
– Anne (Bjerken) Paape

1:20 – 1:40 p.m.  
**Probate Court Jurisdiction and Venue**  
Probate court jurisdiction and venue (*Matthews, Congdon, Sangren*).  
– Charles K. Maier

1:40 – 2:00 p.m.  
**Personal Representative and Trustee Fees**  
Personal representative and trustee fees (*Stisser*).  
– Norman M. Abramson

2:00 – 2:45 p.m.  
**Contesting a Will**  
Testamentary capacity (*Torgerson, Congdon*),  
undue influence (*Reay’s Estate, Wilson’s Estate*).  
– Brian A. Dillon & Susan E. Gaertner

2:45 – 3:00 p.m.  
BREAK

3:00 – 3:20 p.m.  
**Testator Intent and Extrinsic Evidence**  
– Denise S. Rahne

3:20 – 3:40 p.m.  
**Elective Share Rights / Effect of Divorce**  
– Joshua C. Hillger

3:40 – 4:00 p.m.  
**Disclaimers**  
– Joseph J. Cassioppi

# Faculty

**Adam D. Cox**  
*Course Co-Chair*  
Marquette Asset Management, Inc.; Minneapolis

**Anne (Bjerken) Paape**  
*Course Co-Chair*  
Gray Plant Mooty; Minneapolis

**Norman M. Abramson**  
Gray Plant Mooty; Minneapolis

**Matthew T. Boos**  
Fredrikson & Byron, P.A.; Minneapolis

**Carissa W. Brown**  
Lindquist & Vennum, LLP; Minneapolis

**Joseph J. Cassioppi**  
Fredrikson & Byron, P.A.; Minneapolis

**Brian A. Dillon**  
Gray Plant Mooty; Minneapolis

**Matthew J. Frerichs**  
Robins Kaplan LLP; Minneapolis

**Susan E. Gaertner**  
Gray Plant Mooty; Minneapolis

**Joshua C. Hillger**  
Felhaber Larson; Minneapolis

**David C. Joyslin**  
Best & Flanagan, LLP; Minneapolis

**Charles K. Maier**  
Gray Plant Mooty; Minneapolis

**Denise S. Rahne**  
Robins Kaplan LLP; Minneapolis

**Diana M. Ringuette**  
Maslon LLP; Minneapolis

**Cameron R. Seybolt**  
Fredrikson & Byron, P.A.; Minneapolis

**Matthew J. Shea**  
Gray Plant Mooty; Minneapolis

**Julian Zebot**  
Maslon LLP; Minneapolis

# COURSE INFORMATION

**LIVE PRESENTATION**  
**Friday, February 12, 2016**  
Minnesota CLE Conference Center  
600 Nicollet Mall, Suite 370  
Third Floor City Center, Minneapolis

**VIDEO REPLAYS**  
Schedule times for replays may differ from  
the live presentation due to abbreviated  
lunch and break periods. Start times are as  
indicated below.

**Minneapolis – 2/29/16**  
**Minneapolis – 3/17/16**  
(Registration 8:30; Replay 9:00)  
Minnesota CLE Conference Center  
600 Nicollet Mall, Suite 370  
Third Floor City Center

**Brainerd – 4/8/16**  
(Registration 8:30; Replay 9:00)  
The Blue Room  
219 South Ninth Street

**Duluth – 4/22/16**  
(Registration 8:30; Replay 9:00)  
Radisson Hotel Duluth – Harborview  
505 West Superior Street

**Hibbing – 4/8/16**  
(Registration 8:30; Replay 9:00)  
St. Louis County Courthouse  
1810 - 12th Avenue East

**Moorhead – 3/21/16**  
(Registration 9:15; Replay 9:30)  
Moorhead Public Library  
118 Fifth Street South

**Park Rapids – 4/8/16**  
(Registration 8:45; Replay 9:00)  
Hubbard County Courthouse  
301 Court Street

**St. Cloud Area – 5/20/16**  
(Registration 8:15; Replay 8:30)  
Minnesota School of Business  
1201 Second Street South  
Waite Park

**Willmar – 3/29/16**  
(Registration 8:30; Replay 9:00)  
Minnwest Technology Campus  
1700 Technology Drive

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## The Estate Planning, Probate & Trust Law 40

Friday, February 12, 2016 • Minnesota CLE Conference Center

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## The Book

All attendees receive a detailed summary of each case in a  
specially-formatted book. Each summary includes a quick recap of  
the facts, the holding, the author’s commentary about the case,  
and a list of related cases and authorities.

