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To pay by credit card, register online or by phone.

# 2017 ESTATE & TRUST HALF-DAY SEMINARS

DECEMBER 11 & 19, 2017 • MINNESOTA CLE CONFERENCE CENTER

## IN-PERSON SEMINAR REGISTRATION & PRICING:

Please "✓" appropriate tuition and in-person seminar choice(s).

### TUITION FOR IN-PERSON LIVE AND VIDEO REPLAY SEMINARS (per seminar):

\$195 MSBA member  \$195 paralegal  \$215 standard rate  I have a MN CLE Season Pass.<sup>SM</sup>

**1 Focusing on the Key Forms to Plan an Estate** [2037-18]

LIVE: December 11, 2017  MPLS VIDEO: January 4, 2018

**2 Important Forms to Consider Adding to an Estate Plan** [2038-18]

LIVE: December 11, 2017  MPLS VIDEO: January 4, 2018

### TUITION FOR IN-PERSON LIVE AND VIDEO REPLAY SEMINARS (per seminar):

\$155 MSBA member  \$155 paralegal  \$175 standard rate  I have a MN CLE Season Pass.<sup>SM</sup>

**3 Health Care Directives – How to Counsel and Draft with the Health Care Provider in Mind** [2039-18]

LIVE: December 19, 2017  MPLS VIDEO: January 22, 2018

**4 Financial Exploitation of the Elderly – How to Protect Your Clients from This Abuse** [2040-18]

LIVE: December 19, 2017  MPLS VIDEO: January 22, 2018

## WEBCAST REGISTRATION & PRICING:

Tuition for the live webcasts is \$195 (per webcast). Register for webcasts online at [www.minncle.org](http://www.minncle.org).

### PAYMENT:

Enclosed is a check for \$ \_\_\_\_\_

*To pay by credit card, please register online or by phone.*

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DATED MATERIAL – PLEASE EXPEDITE!



# 2017 ESTATE & TRUST HALF-DAY SEMINARS

4 NEW Seminars for Estate and Trust Practitioners

Attend in-person  
Minnesota CLE Conference Center  
600 Nicollet Mall, Suite 370  
Minneapolis

OR

View via live webcast – details inside!



Minnesota Continuing Legal Education  
Your State Bar at Work for You

# 2017 ESTATE & TRUST HALF-DAY SEMINARS

4 NEW Seminars for Estate and Trust Practitioners

Attend in-person or view via live webcast

MONDAY, DECEMBER 11, 2017

- 1 Focusing on the Key Forms to Plan an Estate
- 2 Important Forms to Consider Adding to an Estate Plan

TUESDAY, DECEMBER 19, 2017

- 3 Health Care Directives – How to Counsel and Draft with the Health Care Provider in Mind
- 4 Financial Exploitation of the Elderly – How to Protect Your Clients from This Abuse

# 4 NEW 3-hour seminars in December – Attend 1 or more!

## COURSE INFORMATION

### 1 Focusing on the Key Forms to Plan an Estate

#### IN-PERSON LIVE & LIVE WEBCAST:

Monday, December 11, 2017

#### IN-PERSON VIDEO REPLAY:

Minneapolis – 1/4/18 (Reg. 8:30; Replay 9:00)

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

8:55 – 9:00 a.m.  
WELCOME & INTRODUCTION

9:00 a.m. – 12:15 p.m.  
(includes one 15-minute break)

#### Focusing on the Key Forms to Plan an Estate

Forms to be examined:

- The Maritalized Family Trust Will
- The Maritalized Revocable Trust

Do you understand the benefits and pitfalls in the Maritalized Family Trust Will and the Maritalized Revocable Trust? This seminar focuses on a detailed review of the 2 key forms found in the *Drafting Wills and Trust Agreements Deskbook*. Learn practical information and tips to make your Wills and Trusts practice easier!

- J. Steve Nys  
Mark T. Signorelli, Ltd.; Duluth
- Michael Sampson  
Maslon LLP; Minneapolis
- Jen Santini  
Sykora and Santini PLLP; Minneapolis
- Jayne Sykora  
Sykora and Santini PLLP; Minneapolis

### 2 Important Forms to Consider Adding to an Estate Plan

#### IN-PERSON LIVE & LIVE WEBCAST:

Monday, December 11, 2017

#### IN-PERSON VIDEO REPLAY:

Minneapolis – 1/4/18 (Reg. 12:30; Replay 1:00)

12:30 – 12:55 p.m.  
CHECK-IN & REGISTRATION

12:55 – 1:00 p.m.  
WELCOME & INTRODUCTION

1:00 – 4:15 p.m.  
(includes one 15-minute break)

#### Important Forms to Consider Adding to an Estate Plan

Topics to be discussed and forms to be examined:

- Highlighting the **Powers of Attorney**
  - **Beneficiary Designations including the Revocable Trust for Retirement Plan Benefits** form,
  - A reference to the **Health Care Directive** and
  - Pros and cons of retitling assets when using a **Revocable Trust**
- Jen Santini  
Sykora and Santini PLLP; Minneapolis
  - Jayne Sykora  
Sykora and Santini PLLP; Minneapolis
  - Ruthanne Hedstrom Vos  
Mathison & Vos PLLC; Grand Marais

### 3 Health Care Directives – How to Counsel and Draft with the Health Care Provider in Mind

#### IN-PERSON LIVE & LIVE WEBCAST:

Tuesday, December 19, 2017

#### IN-PERSON VIDEO REPLAY:

Minneapolis – 1/22/18 (Reg. 8:30; Replay 9:00)

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

8:55 – 9:00 a.m.  
WELCOME & INTRODUCTION

9:00 – 10:30 a.m.

#### Health Care Provider Panel Discussion

How do health care teams interpret and honor the wishes our clients express in their health care directives? How can health care providers inform the way we counsel clients as we draft health care directives? Join us for a seminar designed to share practical tips, examples and strategies. Hear from physicians, attorneys and Honoring Choices Minnesota about:

- How to counsel clients to help them articulate specific health care wishes and values
  - How to draft a health care directive that health care teams can understand and honor
  - What the health care team wants to learn from the health care directive
- Melissa Hagstrum Bayne  
Larkin Hoffman; Minneapolis
  - Tara D. Mattessich  
Larkin Hoffman; Minneapolis
  - Karen Peterson  
Honoring Choices Minnesota; Minneapolis
  - Dr. Jennifer Kuyava  
Allina Hospice; Robbinsdale
  - Dr. Carolyn A. McClain  
Emergency Physician P.A.; Minneapolis

10:30 – 10:45 a.m.  
BREAK

10:45 a.m. – 12:15 p.m.

#### How to Counsel Clients and Draft Health Care Directives with Health Care Providers in Mind

- How to advise clients who wish to appoint joint health care agents
  - Topics to consider addressing in a health care directive
  - Differences to consider when drafting health care directives for clients who are healthy, chronically ill, or terminally ill
- Melissa Hagstrum Bayne  
Larkin Hoffman; Minneapolis
  - Tara D. Mattessich  
Larkin Hoffman; Minneapolis
  - Karen Peterson  
Honoring Choices Minnesota; Minneapolis

### 4 Financial Exploitation of the Elderly – How to Protect Your Clients from This Abuse

#### IN-PERSON LIVE & LIVE WEBCAST:

Tuesday, December 19, 2017

#### IN-PERSON VIDEO REPLAY:

Minneapolis – 1/22/18 (Reg. 12:30; Replay 1:00)

12:30 – 12:55 p.m.  
CHECK-IN & REGISTRATION

12:55 – 1:00 p.m.  
WELCOME & INTRODUCTION

1:00 – 4:15 p.m.  
(includes one 15-minute break)

#### Financial Exploitation of the Elderly – How to Protect Your Clients from This Abuse

- What does elder abuse look like?
  - How to spot elder abuse as a practitioner.
  - What legal remedies are available to your client?
- Margaret M. “Pook” Grathwol  
Chestnut Cambronne; Minneapolis
  - Lisa Henry  
Chestnut Cambronne; Minneapolis
  - Peter Orput  
Washington County Attorney; Stillwater
  - David Rephan  
Chestnut Cambronne; Minneapolis

#### SEMINAR LOCATIONS

- **In-Person Live Seminars**  
Minnesota CLE Conference Center  
600 Nicollet Mall, Suite 370  
Third Floor City Center, Minneapolis

- **Live Webcasts**  
Webcasts are viewed online at [www.minncle.org](http://www.minncle.org).

- **In-Person Video Replays**  
Minnesota CLE Conference Center  
600 Nicollet Mall, Suite 370  
Third Floor City Center, Minneapolis  
Please register for video replays at least one week in advance to secure your copy of the course materials on the day of the seminar.

#### CREDITS

Minnesota CLE has applied to the Minnesota State Board of CLE for **3.0 standard CLE credits** for each course.

#### ACCOMMODATION

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

#### CANCELLATION / NO-SHOW POLICY

Paid registrants who cancel their registration at least 3 business days before the program will receive a full credit on their account; if fewer than 3 business days, a \$25 administrative fee will be deducted. Paid registrants who do not cancel, yet fail to attend, will receive the written materials.

#### SCHOLARSHIPS AVAILABLE

Minnesota CLE maintains a scholarship program for those with a financial need. Most scholarships awarded are 50% off the seminar price. For more information or to obtain an application, contact Grant at [gdavies@minncle.org](mailto:gdavies@minncle.org) or **651-254-2111** for details.

#### QUESTIONS?

If you have any questions or need further information, call Minnesota CLE at **651-227-8266** or **800-759-8840** or visit us online at [www.minncle.org](http://www.minncle.org).

## SAVE THE DATES!

## 2018 Probate & Trust Law Section Conference

June 4 & 5, 2018  
Saint Paul RiverCentre

Register at [www.minncle.org](http://www.minncle.org)

Register today at [www.minncle.org](http://www.minncle.org)