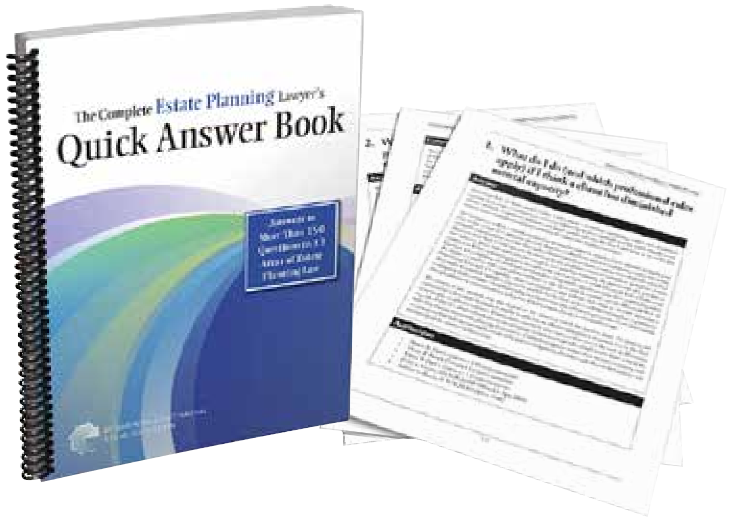
The Complete Estate Planning Lawyer's

Quick Answer Book

FREE to all attendees!



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DATED MATERIAL – PLEASE EXPEDITE!

RECYCLABLE

The Complete Estate Planning Lawyer

UPDATED FOR 2018!

Free Publication to All Attendees!

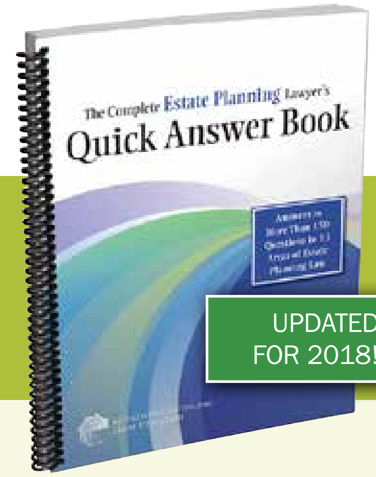
View information on your mobile device or register online.

TUESDAY, SEPTEMBER 25, 2018

Video replay dates available.

Minnesota Continuing Legal Education
Your State Bar at Work for You

The Complete Estate Planning Lawyer



UPDATED FOR 2018!

Answers to More Than 150 Questions in 13 Areas of Estate, Probate, and Trust Law

- Fast-paced and focused sessions to refresh and extend your understanding of common issues
- Convenient and practical advice to invigorate your approach to estate planning
- **FREE TO ALL ATTENDEES – *The Complete Estate Planning Lawyer's Quick Answer Book***, updated for 2018. A must have reference guide of answers, legal authority, and commentary for the questions discussed at the course!

TUESDAY, SEPTEMBER 25, 2018
Minnesota CLE Conference Center
600 Nicollet Mall, Suite 370 | Third Floor City Center, Minneapolis

Video replay details inside.

Practical Information for Every Estate Planning Lawyer!

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

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

9:00 – 9:30 a.m.
Ethics and Client Relationships in Estate Planning
0.5 ethics credit applied for
- Can I represent a client adverse to a former estate planning client?
- What do I do (and which professional rules apply) if I think a client has diminished mental capacity?
- What are the ethical considerations related to flat-fee billing?
- And more

– *Melissa A. Saunders & Kari Stonelake-Hopkins*

9:30 – 10:00 a.m.
Estate Planning, Generally
- What should be included in the estate planning discussion between me and my client?
- What are the legal requirements to execute common estate planning documents (will, trust, health care directive, power of attorney)?
- What are the estate planning considerations for non-U.S. citizens?
- And more

– *Tara D. Mattessich*

10:00 – 10:30 a.m.
Incapacity Planning: Health Care Directives and Powers of Attorney
- What are the requirements for signing a valid health care directive?
- What are the different types of powers of attorney recognized in Minnesota?
- And more

– *Tara D. Mattessich*

10:30 – 10:45 a.m. BREAK

10:45 – 11:15 a.m.
Probate Administration
- What are the Personal Representative's options when beneficiaries disagree on the distribution of tangible personal properties?
- What is the difference between Supervised and Unsupervised Administration?
- What constitutes a claim against the probate estate?
- And more

– *Ivory S. Umanah*

11:15 – 11:45 a.m.
Trust Administration
- What are the duties and responsibilities of a trustee?
- What are the first steps a trustee should take when the grantor dies?
- What happens when there is an error in the trust document?
- And more

– *Philip J. Ruce*

11:45 a.m. – 12:15 p.m.
Real Estate
- When conveying real estate to a trust, should it be conveyed to the trust or to the trustee?
- What is a medical assistance clearance certificate and when is it used?
- Can real estate be transferred to an heir/devisee/beneficiary if there is still a mortgage on the property?
- And more

– *Jennifer Santini & Jayne Sykora*

12:15 – 1:00 p.m. LUNCH (on your own)

1:00 – 1:30 p.m.
Retirement Planning
- Are there circumstances when a surviving spouse should not roll the decedent's retirement account into his or her own IRA?
- If a retirement account lists a trust as the beneficiary, what rules must be followed to calculate RMDs based upon the life expectancy of the trust beneficiaries?
- What is a Qualified Charitable Contribution and why should my clients consider using this concept?
- And more

– *Bryan Jamison*

1:30 – 2:00 p.m.
Navigating Family Dynamics
- How should my client provide for a child from a previous relationship or marriage in his/her estate plan?
- What should I look for in an ante-nuptial (prenup) agreement when drafting a client's estate plan?
- My client is on his/her second marriage and has children from a previous marriage. Whom should the client name as attorney-in-fact and personal representative?
- And more

– *Courtney R. Sebo*

2:00 – 2:30 p.m.
Litigation in Estate, Probate, and Trusts
- You prepared a will for a client who has now died. The client's estranged daughter calls. She asks for a copy of the client's file. Can you provide it without a court order?
- Client's uncle is the trustee of Client's father's trust and the personal representative of Client's father's estate. Client is a trust beneficiary and a residual devisee of the estate, and suspects uncle is stealing from both. Client asks what she can do to stop him!
- And more

– *Kirstin E. Helmers & Pamela D. Steinle*

2:30 – 2:45 p.m. BREAK

2:45 – 3:15 p.m.
Business Succession Planning
- My client plans to rely on cash flows from her business as her primary source of retirement income. What kind of business succession planning can she do to secure her retirement?
- Will my client's business/business partners have enough liquidity to buy out my client's interest without having to sell the business?
- The value of my client's business is starting to really explode. Is there anything I should be doing from an estate planning perspective?
- And more

– *Diana L. Marianetti*

3:15 – 3:45 p.m.
Charitable Planning
- How does one name a charity as a beneficiary on a bank or brokerage account?
- What are the income tax deduction limits and rules for lifetime charitable gifts?
- What is a Charitable Remainder Trust and when is it beneficial?
- And more

– *Sheryl G. Morrison*

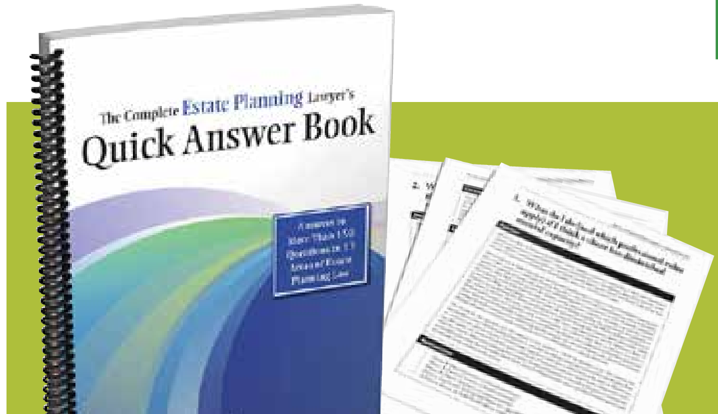
3:45 – 4:15 p.m.
Other Tax Considerations
- My client is a trustee of an irrevocable trust and would like to make a distribution to a new trust established for one of the beneficiaries. What are the rules for decanting a trust in Minnesota?
- My client would like to help pay for her grandchild's college education. What are some planning options I should recommend?
- My client recently passed away and his net worth exceeds the Minnesota estate tax exemption. Should his surviving spouse disclaim assets into his disclaimer trust? How do you make a qualified disclaimer?
- And more

– *Katherine A. Charipar*

4:15 – 4:45 p.m.
Guardianships and Conservatorships
- What is the difference between guardianship and conservatorship?
- What is "supported decision making?"
- Can a guardianship from another state be transferred into Minnesota?
- And more

– *John Kantke*

Can't Attend on September 25?
Attend a video replay in Minneapolis or across the state.



All Attendees Receive *The Complete Estate Planning Lawyer's Quick Answer Book*

This helpful resource includes answers to more than 150 top questions, along with legal authorities, author commentary, and practical pointers.

LIVE PRESENTATION

Minneapolis – 9/25/18
Minnesota CLE Conference Center
600 Nicollet Mall, Suite 370
Third Floor City Center

Parking is available in the City Center parking ramp for only $12 per day if you arrive before 8:30 a.m. and leave after 1:00 p.m.

VIDEO REPLAYS

Video replay times may differ from the live presentation due to abbreviated lunch and break periods. Check-in and start times are as indicated below.

Minneapolis – 10/11/18
(Registration 8:30; Replay 9:00)
Minnesota CLE Conference Center
600 Nicollet Mall, Suite 370

Bemidji – 11/5/18
(Registration 8:30; Replay 9:00)
Brouse, Woodke & Meyer Law Firm
312 America Avenue NW

Detroit Lakes – 10/16/18
(Registration 8:30; Replay 9:00)
Becker County Courthouse
915 Lake Avenue

Hibbing – 11/2/18
(Registration 8:30; Replay 9:00)
St. Louis County Courthouse
1810 12th Avenue East

Mankato – 11/2/18
(Registration 8:15; Replay 8:30)
Farrish Johnson Law Office
Eastwood Industrial Centre
1907 Excel Drive

Marshall – ~~11/2/18~~ 11/9/18
(Registration 8:30; Replay 9:00)
Runchey, Louwagie & Wellman
533 West Main Street

Moorhead – 11/7/18
(Registration 9:00; Replay 9:15)
Moorhead Public Library
118 Fifth Street South

Rochester – 10/26/18
(Registration 8:30; Replay 9:00)
Rochester Public Utilities Community Room
4000 East River Road Northeast

Saint Cloud – 11/15/18
(Registration 8:30; Replay 8:30)
Rinke Noonan Law Firm Conference Room
1015 West St. Germain Street

Willmar – 12/6/18
(Registration 8:30; Replay 9:00)
Anderson, Larson, Hanson & Saunders
331 Third Street Southwest

CREDITS

Minnesota CLE is applying to the State Board of CLE for **6.5 CLE credits, including 0.5 ethics credit**. The maximum total number of CLE credits an attendee may report for this course is 6.5.

SCHOLARSHIPS AVAILABLE

Minnesota CLE maintains a scholarship program for those with a financial need. Most scholarships awarded are 50% off the seminar price. To obtain an application, contact Grant at **651-254-2111** or **gdavies@minncle.org**.

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. Passholders may purchase the materials for 50% of the full retail price.

ACCOMMODATION

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

QUESTIONS?

Call Minnesota CLE at **651-227-8266** or **800-759-8840**. Or, visit **www.minncle.org**.

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The Complete Estate Planning Lawyer

Tuesday, September 25, 2018 | Minnesota CLE Conference Center

PLEASE "✓" APPROPRIATE BOX BELOW:

LIVE – 9/25/18:
☐ $235 MSBA member ☐ $235 paralegal ☐ $285 standard rate

VIDEO:
☐ $205 MSBA member ☐ $205 paralegal ☐ $255 standard rate

Location ____________ Date ____________

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JOIN THE MSBA AND PAY LESS FOR MINNESOTA CLE SEMINARS!
To join the MSBA go to **www.mnbar.org**
Or for more membership advantages call **1-800-882-6722**

CAN'T ATTEND? GET THE MATERIALS!
You can purchase ***The Complete Estate Planning Lawyer's Quick Answer Book*** for $75 (plus tax and handling) by calling Minnesota CLE at 800-759-8840 or 651-227-8266.
Available in hardcopy. Orders filled after the live seminar.

PAYMENT:

☐ **I have a Minnesota CLE Season Pass**SM.

☐ **Enclosed is a check for $** ____________
To pay by credit card, please register online or by phone.

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