

THE 42<sup>ND</sup> ANNUAL

# Probate & Trust Law

## Section Conference



Minnesota Continuing Legal Education

### What You Want:



- Building a practice
- How to help your client through succession planning
- Drafting effective documents
- Drafting and administration after the UTC
- Dealing with dementia
- Formatting in the digital age
- Handling audits
- Managing retirement accounts – distributions
- Working with advisors
- Planning for adults with disabilities
- Transferring the family cabin

### What You Need:

- **Ron Aucutt**  
“What We Can Expect from Washington”
- Economic outlook and market forecast = higher quality client discussions
- All the new law plus multiple UTC-related sessions
- Sessions designed and taught to help solo/small, large firm, and metro/rural – what you need to be the best you can be!

**Monday & Tuesday  
June 6 & 7, 2016  
Saint Paul RiverCentre**

### Value Added:

- Ag Track: CRTs; defined benefit plans; FLPs and more 
- Panels: New Elder Law Panel plus New Lawyer, Small Estate, Large Estate, Trust Officer and Probate panels 
- 3 ethics credits – Avoid Malpractice!
- An annotated GRAT
- What Judges want and expect
- Terrific materials and a chance to network with 800 colleagues!

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# SCHEDULE – DAY 1

7:15 – 7:50 a.m.

REGISTRATION & CONTINENTAL BREAKFAST

*Sponsored by The Northern Trust Company*

7:50 – 8:00 a.m.

WELCOME & INTRODUCTION

*Peter S. Hatinen; Probate & Trust Law Section Chair*

8:00 – 8:45 a.m.

**Non-Tax Case Law Update**

*Robert A. McLeod*

8:45 – 9:45 a.m.

**MAIN PLENARY**

**You May be Paranoid, But They Really Are Out There and After You: Malpractice and Ethical Concerns of Estate Planners**

**1.0 ethics credit applied for**

Limitations issues on a legal malpractice claim; duties to the client as a second lawyer who sees malpractice by the first lawyer; limitation and coverage issues in malpractice insurance; scope of exposure to and immunity from malpractice claims for estate planners; and the role in importance of documents in a malpractice case against an estate planner.

*Randy Johnston*

8:45 – 9:45 a.m.

**ALTERNATE PLENARY**



**New Lawyer Panel**

Important practical and substantive aspects of representing clients in the areas of estate planning and estate administration that a new lawyer will face but may not have learned about in the law school classroom. Topics include: building a practice and managing client relationships and expectations; surviving your first probate administration; structuring an estate plan to minimize the impact of transfer taxes; fundamentals of administering trusts and estates; and preparing your first estate or gift tax return.

*Kiley E. Henry, Rachel M. Knutson, Brianna M. Mooty & Kimberly A. Prchal  
Adam J. Rohne, moderator*

9:45 – 10:15 a.m.

NETWORKING BREAK

10:15 – 11:15 a.m.

**BREAKOUT SESSION A – “SUPER” BREAKOUTS**

**101) Navigating the Oft Rough Waters of Family Business Succession – Those not ruled by the rudder will be ruled by the rocks!**

The transfer of ownership interests or a key retirement within the family-owned business can often set off a hailstorm of hazards and knotty issues for those involved. This breakout session will help you to identify key leverage points for planning within your clients' ownership and management transitions, and how to help your client ensure smooth waters for sailing through succession unscathed.

*M. Abigail Barrett, M.A., L.P.*

**102) Legal Writing Workshop – Drafting Effective Documents: Avoiding Ambiguity**

Using plain English in estate planning instruments; sources of ambiguity and how to avoid them; recurring problem areas involving grammar and construction; formatting in the digital age; and mechanics – how to avoid making embarrassing mistakes.

*Chad Baruch*

**103) Post-Death Distributions from Retirement Accounts**

Discussion of tax rules regarding inherited IRAs and other retirement accounts. A practical guide to fool-proof distributions for all attorneys and a discussion of complex planning options including distributions of retirement accounts through trusts for experienced attorneys.

*Bryan Jamison*



**104) Charitable Remainder Trusts – In-Depth for Farmers – Part I**

Types of Charitable Remainder Trusts; the benefits of Charitable Remainder Trusts; unique planning opportunities for farmers using Charitable Remainder Trusts; and helping your client identify prohibited transactions with their Charitable Remainder Trusts.

*Lori A. Peterson*

11:15 – 11:30 a.m.

BREAK

11:30 a.m. – 12:30 p.m.

**BREAKOUT SESSION B**

**201) Drafting and Administration Under the Minnesota Trust Code: Now the Real Fun Begins**

Directed trusts; decanting; silent or “secret” trusts; springing the “Delaware tax trap”; other drafting changes necessitated by new law; and the “material purpose of the trust” and statements of settlor’s intent.

*Wendy M. Brekken, James T. McNary & Michael P. Sampson*

**202) That’s an “Interesting” Idea: Estate Planning for the Family Cabin – Passing Property to the Next Generation While Minimizing Tax and Tension, in the Minnesota Way**

This session will offer practical pointers to attorneys who are charged with helping a family transfer a vacation property to the younger generation. We will review the tax consequences of transferring property during life and at death; explore the various options for property ownership, whether it be outright, in trust, or through an entity, and discuss how creditor protection and family dynamics can impact the ownership structure decision; discuss the benefits and drawbacks of the various methods for transferring a vacation property; and offer sample questions that attorneys should ask their clients who are involved in transferring or receiving the family vacation home.

*Katherine A. Charipar & Joel A. Sommers*



**203) The Elder Law Panel**

This panel of experienced Elder Law attorneys will discuss the legal and practical skills needed to represent the elderly and their family members in dealing with dementia issues, avoiding the need for guardianship and conservatorship, trusts, government income programs, senior housing, health care planning as part of estate planning, and the need for Medical Assistance to pay for long-term care.

*Randy F. Boggio, Lisa J. Bowen, Cathryn D. Reher, Jeffrey W. Schmidt & Julian J. Zweber*



**204) Charitable Remainder Trusts – In-Depth for Farmers – Part II**

Types of Charitable Remainder Trusts; the benefits of Charitable Remainder Trusts; unique planning opportunities for farmers using Charitable Remainder Trusts; and helping your client identify prohibited transactions with their Charitable Remainder Trusts.

*Lori A. Peterson*

**205) The Charitable Component of Estate Planning**

How to raise the topic of charitable giving with clients; the “Who, What, Where, When, Why and How” of charitable giving; basic and intermediate-level giving techniques; fact patterns that illustrate techniques; how to avoid common errors in charitable planning as seen by other attorneys, trust officers, and charitable organizations; and the concept of leaving a legacy.

*Christopher J. Burns, Sheryl G. Morrison & Grant K. Wacker*

**206) Protecting and Preserving Your Client's Business Assets**

Preliminary matters to consider: Who should be on your team? What are the client's goals? What does the business already have in place?; How to utilize estate planning documents to help clients realize their business succession goals; when and how to use buy sell agreements, redemptions, recapitalizations, etc. to transfer interests to different groups of people (insiders, employees, management, family, etc.); what happens to the business interests after a client dies; and an explanation of some more advanced estate planning tools that can be used to transfer business interests and what to consider when evaluating whether or not to use these options.

*Holly L. Malcomson & Matthew J. Shea*

**207) Troubleshooting Irrevocable Trusts – Choosing the Right Tool for the Job: How to Use the Newly Expanded Set of Tools for Changing Irrevocable Trusts to Solve Old Problems Without Creating New Ones**

Brand new tools (and some old ones) allowing for changes to the terms of irrevocable trusts, including decanting, trust protectors, reformations and mergers; case studies to discuss the risks, benefits and limitations of various approaches that could be used to address each specific problem; and drafting tips that can enhance or limit the available methods to amend or revoke irrevocable trusts.

*Cameron R. Seybolt*

12:30 – 1:30 p.m.

INSTITUTE LUNCHEON (provided)

*Sponsored by First Lawyers Trust Company*

1:30 – 2:30 p.m.

**BREAKOUT SESSION C****301) The Large Estate Panel: Planning and Administering Large Estates – Have Our Venti's Become Grande's?**

What constitutes a "large estate" today under current tax laws; issues involved in the planning and administration of large estates; issues covered will include post-mortem planning, gift and estate tax audits, planning to avoid net investment income tax, and constitutional issues surrounding state fiduciary income tax and a focus to a large extent on real-life situations that have arisen at our respective firms.

*Jolene M. Cutshall, Eileen M. Day & Sonny F. Miller*

*Cameron R. Seybolt, moderator*

**302) Noise versus Insight: Investment and Economic Outlook – 'Breaking News': It's so loud out there! How do we communicate a viewpoint while dealing with the bombardment from talking heads screaming conflicting opinions?!**

An update on the current Economic Outlook and Market Forecasts... without 40 charts and graphs, and with minimal jargon designed to 'prove' an opinion! When advisors and clients are dealing with market declines and higher volatility, what are the two most important economic questions we ALWAYS need to ask? The answers to those questions provide a framework for higher quality client discussions.

*William J. Gleason, CFA*

**303) Definitely Beneficial: The Wonderful World of Defined Benefit Plans for Farmers – An Amazing and Overlooked Income Tax Strategy for Farmers to Address Income Taxes Near the End of Their Careers**

This session will discuss how defined benefit plans work in general and general plan concepts; farmers' unique income tax situations and planning needs, especially as they relate to end-of-career income tax consequences; four different possible and typical scenarios where defined benefit plans can minimize end-of-career income tax consequences for farmers: 1) In general – simple defined benefit plan; 2) when a farmer will liquidate farm assets at retirement; 3) when a farmer wishes to transition the farm business to a farming successor/child; and 4) when farmer would like to leave all farm assets to a

farming successor/child but leave substantial other investments (the defined benefit plan) to non-farming children. Steps to take to implement the plan and cover working with CPAs, attorneys, and plan administrators to set up the plan; and how to identify likely client situations where a defined benefit plan would likely help the client minimize estate taxes.

*Jennifer L.J. Gilk & Vern Vliet*

**304) 10 Frequently Encountered Issues and Solutions from the Corporate Trustee**

Common situations where an attorney should consider recommending a corporate trustee; how a corporate trustee is best suited to handle such situations; and how to identify and name a corporate trustee in documents.

*Robyn L. Ingber & Julie A. Westbrook*

**305) DNI? Don't Neglect Income – An Income Tax Primer for Estate Planners**

Federal and Minnesota estate, gift, and income tax laws, rates, and exemptions; framework for determining cost basis; overview of income taxation of trusts; and discussion of planning considerations including bypass trusts v. portability, gifting assets, and titling assets between spouses.

*Katherine A. Charipar & Brianna M. Mooty*

**306) Estate and Long-Term Care Planning for Adults Living with a Disability**

Developing a framework for the plan – understanding the nature of the client's disability; understanding the income and health care benefits available to the client; options for managing money, including ABLE accounts; options for managing health care; and issues for parents – supplemental needs trust and effect of an inherited IRA on the public benefits.

*Laurie A. Hanson*

**307) I Come Not to Bury the Trust but to Praise It – Why Trusts Remain the Most Powerful Wealth Transfer Planning Vehicle**

Why the "game" has not changed. It's just that our choices have expanded and the relevant criteria have shifted in relative importance. They will do so again. The current state of trust law and taxation; a brief history – from old, inflexible trust to new, flexible adaptable sophisticated modern vehicle; relevance of income tax rates, asset basis, portability to asset protection fundamentals; cost-benefit analysis expanded; what clients want versus what they say they want; and using trusts to meet human challenges and capitalize on opportunities.

*John R. Bedosky*

2:30 – 2:45 p.m.

BREAK

2:45 – 3:45 p.m.

**BREAKOUT SESSION D****401) The Elephant (or the Donkey) in the Room – The Probate Panel**

This panel of experienced probate practitioners will pose for the audience common questions that arise for attorneys and paralegals during the administration of a decedent's estate and then use the Voting Response System to poll the audience for responses and then discuss the collective answers. Questions will address issues with: rights of children conceived through assisted reproduction; determining proper jurisdiction/venue for "snow birds"; attorney's "duties" in dealing with non-probate assets; determining appropriate attorneys' fees; negative allegations (the new language); Notice to Commissioner of Human Services; Summary Administration; informal priority for appointment; e-filing; and creditor claims as they relate to: 1) trusts, 2) life insurance, 3) notice requirements, and 4) insolvent estates.

*William R. Asp, Andrea S. Breckner, Cynthia R. Costello, Daniel R. Donovan, Julie Peterson, Michael P. Sampson & Peggy Zdon*

*Susan J. Link, moderator*

# SCHEDULE – DAY 1, CONTINUED



## 402) Holding Company/Family Limited Partnerships – Focused on Ag-Related Issues and Holdings

Understand how holding companies/family limited partnerships operate and the tax and non-tax reasons for holding companies; basic understanding on how an ownership interest in a holding company is appraised; discounts for lack of control and lack of marketability and what impacts the level of the discounts; what assets are well suited to be held in a holding company, and what assets may not be the best candidates; how farmland, actual farming operations and farming equipment fit into the holding company concept; getting the underlying farming assets appraised; and watch for the alternative valuation date for estate purposes.

*Richard C. Berning & John H. Heidebrecht*

## 403) Working with Advisors to Trustees After the UTC

Provisions of the UTC relating to advisors to trustees; recent cases involving directed trustees; litigation risks with trust advisors; and drafting considerations when naming trust advisors.

*William C. Kuhlmann & Joseph S. Lawder*

## 404) Sophisticated Estate Planning for the Executive – Corporate Execs

Integrating executive compensation into an estate plan. The estate objectives are the same, but the issues are different; overview of equity based compensation: explore and explain composition of executive compensation from stock options, to restricted stock to deferred compensation and long-term incentive plans; unique planning issues for equity based compensation, including income/estate tax, transferability, SEC issues, and liquidity and diversification issues. Explore and explain differences between incentive stock options and non-qualified options and estate planning opportunities; diversification issues confronting corporate executives before and after death. Briefly explain options available to diversify or protect concentrated holdings; and unique lifetime charitable planning complications faced by executives due to SEC issues surrounding stock.

*Mitchell A. Drossman & Lynne L. Pantalena*

## 405) Current Issues in Special Needs Trusts Drafting and Administration

The top drafting errors causing problems for beneficiaries of special needs trust; drafting issues for individuals who receive public housing assistance, MA and SSI; how to fix errors if the agency informs you that benefits have been denied due to the establishment or administration of the trust; you now can establish a pooled trust sub-account for individuals age 65 and older without jeopardizing Medical Assistance eligibility as long as fair market value is achieved; and issues raised by the new trust code.

*Laurie A. Hanson*

## 406) Grantor Retained Annuity Trusts – Understanding the ABCs of GRATs

A GRAT can shift asset value from the senior generation to the junior generation with little or no gift tax liability. When and how to include a GRAT in your client's estate plan.

*Todd D. Andrews, Alan J. Yanowitz & Claire Langton-Yanowitz*

3:45 – 4:00 p.m. BREAK

4:00 – 5:00 p.m.

## BREAKOUT SESSION E



## 501) Q&A with the Corporate Fiduciary Panel: We Don't Just Pay Bills

Changes to corporate policy and procedure stemming from the adoption of the UTC (e.g. fee schedule; role of investment advisor, distribution advisor, excluded fiduciary and trust protector); non-judicial settlement agreements, decanting and reformation/modification from a corporate fiduciary perspective; silent trusts and providing annual statements (either representative to receive and/or court approval in accordance with 501C.0813(b)); notice (SOL) and other policy considerations upon death of settlor; questionable discretionary distribution requests; and use of budgets when making discretionary distributions (whether trust agreements require we take "other assets" of a beneficiary into consideration).

*Barbara Frick Mitchell, Adam Stern & Ann M. Wilczynski  
Trisha A. Vicario, moderator*

## 502) It's All in the Family... What's a Family? Changing Family Structures and Dynamics and Their Implications for Estate Planning, Trust Design and Trust Management

Statistical data on family structures in the United States; limitations of the "nuclear family" estate planning paradigm; development of new paradigms for estate planning and trust design for blended/expanded families; and issues in trust design and management – multi-beneficiary trusts, notice and accounting, discretionary standards, powers of appointment.

*R. Hugh Magill*



## 503) USDA Farm Service Agency (FSA) Payment Limitation Eligibility: Changing Farm Operations

What is the definition of a joint operation for USDA FSA purposes; what is the definition of an "entity" for USDA FSA purposes; how many payment limitations would each type of operation be eligible to receive; what implications are there under USDA eligibility rules if I change my farming operation from a General Partnership to a Limited Liability Corporation; and USDA FSA has "substantive change" rules, what affect do those rules play in changes to a farming operation.

*Lisa MacDonald & Laurie Moss*

## 504) International Estate Planning Issues for Every Estate Planner: What You Don't Know Can Hurt You

Highlights from real-world scenarios that involve unexpected yet common international income and transfer tax concerns. These often arise in connection with estate planning issues that appear to be purely domestic at first glance. Topics covered by this presentation include: noncitizens living in the U.S.; planning for non-resident aliens with U.S. connections; ownership of foreign property (residential property, investments and foreign bank accounts); and foreign trusts with U.S. beneficiaries. This presentation will help planners better identify potential international estate planning issues, whether it is a client with a Canadian cabin, a client who wants to name a non-U.S. person as a fiduciary or a client whose spouse turns out not to be a U.S. citizen despite having lived in the U.S. for years.

*Julia L. Rau & Karen N. Sandler Steinert*

## 505) Working with Your Client's Financial Advisor and Custodian: Why Won't You Take My Beneficiary Designation, and Other Tips/Tales from the "Other Side"

Understanding of rules/regulations governing practices of Registered Investment Advisers (RIAs) and Custodians, when it comes to accepting documents prepared by client's legal counsel; tips that can make working with a custodian run more smoothly and opportunity for participants to ask questions and provide feedback with their experiences with a custodian (lesser objective).

*Gerri Gibbs, Robert W. Mairs, Jon Moore & K.C. Waldron*

## 506) Ethical Considerations in Representing Clients in Estates, Trusts and Administration in Local and Other Jurisdictions – Stay Out of the Minefield!

### 1.0 ethics credit applied for

Who is your client and in what capacity is the client seeking representation?; Applicable rules governing your responsibilities to your client; conflicts of interest considerations; how to address issues of diminished capacity in those you represent; and attorneys in fiduciary roles, should you or should you not?

*Jacqueline M. Schuh & Ivory S. Umanah*

## 507) Medical Assistance Update

DHS continues to struggle with administration of health care programs that have become too complicated to administer efficiently. The effort to prevent low-need individuals from admission to nursing homes and qualification for benefits under home- and community-based programs continues with little to show besides significant expansion of bureaucracy. Expansion of the spousal deeming rules to married persons in community settings will cause hardship to many and benefits to some. Estate recovery efforts continue to complicate efforts to dispose of real estate when family members have no incentive to take the lead. In short, 2015 was another year with more medical assistance complications to explain and more aggravations to discuss.

*Julian J. Zweber*

5:00 – 6:15 p.m.

INSTITUTE RECEPTION

*Sponsored by Abbot Downing &  
The Wells Fargo Private Bank*



# SCHEDULE – DAY 2

7:30 – 8:00 a.m. CONTINENTAL BREAKFAST

8:00 – 9:00 a.m.

## BREAKOUT SESSION F

### 601) What Minnesota Lawyers Should Know About Florida Law

Learn the basics of Florida homestead law, and its dangers for planners – creditor protection, real property tax – save our homes qualification, and limitations on devises of the homestead; new Florida power of attorney form; spousal elective share; short statutory summary of the statutes on wills, probate and trusts; Florida statutory provisions on fees of personal representatives and trustees, and their attorneys; and who can be a personal representative or trustee in Florida.

*Terry L. Slye*



### 602) The Small Estate Panel

The legal documents one may use to specify end-of-life wishes and the Minnesota law that codifies patients right to die, including a discussion of the interaction between a MN HCD, POLST, DNR/DNI and the proposed “Minnesota Compassionate Care Act”; properly using beneficiary designations in an estate plan to reduce income tax and avoid inconsistency in the plan; how to handle tangible personal property in the estate plan; and resources available to solo and small offices to enhance your expertise and protect you from potential malpractice risks.

*Peter M. Hendricks, Bryan Jamison & Mary Frances M. Price  
James T. McNary, moderator*



### 603) Homestead Classification of Land in Deceased Spouse’s Estate/Marital Trust/Family Trust: How to Maximize Minnesota Estate and Property Tax Benefits in Basic and Complex Estate Plans

The basics of getting (and keeping) Agricultural Homestead; why maintaining Ag Homestead classification matters in estate planning; the trick to maximizing Ag Homestead during the surviving spouse’s lifetime if testamentary trusts are involved; what is Special Agricultural Homestead; and when can separate parcels be “linked” to one Ag Homestead?

*Kaitlin M. Pals*

### 604) Practicalities of Retitling Assets and Updating Beneficiary Designations: Dotting the I’s and Crossing the T’s of an Estate Plan

Retitling assets such as real estate, bank accounts, safe deposit boxes, cars and more for your clients’ unique estate planning needs; how to best assist clients and their financial institutions with updating clients’ beneficiary designations. This session will provide various examples of situations encountered when retitling assets and updating beneficiary designations for your clients and provide practical suggestions on how to best overcome various issues that come up.

*Maggie Green, Jamie F. Held, Jennifer S. Santini & Jayne E. Sykora*

### 605) Income Tax Challenges When Trusts Own Pass-Through Entities – “Passive” Doesn’t Mean You Shouldn’t Take Action!

The difference between “fiduciary accounting income” and “trust taxable income”; the impact of fiduciary duties on tax policy for the trust; considerations and duties when a trust holds an ownership interest in a pass-through entity (i.e. the underlying assets are owned through another entity); how a trust “materially participates” in an investment; and how the “passive activity loss” rules apply to trusts.

*Kelli A. Hill & Marcia E. Urban*

### 606) Six Months Under the Minnesota UTC and Other Views from the Bench

*Judge Jamie L. Anderson, Judge B. William Ekstrum,  
Judge Shawn M. Moynihan & Referee Joel C. Olson  
Alan I. Silver, moderator*

### 607) Avoiding the Ethical Danger Zones in Contested Matters: A Practical Guide to Professional Ethics for Non-Litigators 1.0 ethics credit applied for

Practical advice regarding ethical issues that often arise in the context of contested trust and estate litigation, including scope of representation, privilege/client confidentiality, attorneys’ fees, and – everyone’s favorite – conflicts of interest.

*Julian C. Zebot*

9:00 – 9:30 a.m.

BREAK

*Sponsored by Masonic Cancer Center,  
University of Minnesota*

9:30 – 9:45 a.m.

SECTION MEETING

9:45 – 10:15 a.m.

### Legislative Update

*Michael P. Sampson & Jason W. Schuller*

10:15 – 10:45 a.m.

### Important Considerations for End-of-Life and Incapacity Planning

A panel of practitioners who have prepared resources and spoken on this crucial topic in the past year will identify some of the most important considerations related to end-of-life and incapacity planning to further the client’s objectives while preserving the attorney’s professional interests, including: capacity, undue influence, limits on powers of attorney, drafting health care directives, preparing the agent, and more.

*Melissa Hagstrum Bayne, Kirstin E. Helmers, Rodney J. Mason & Tara D. Mattessich*

10:45 – 11:45 a.m.

### Vibes from the Turmoil of Washington, D.C. – An Up-to-the-Minute Report from Inside the Beltway

Is the estate tax really permanent; does the presidential campaign, or even the election, matter; can anything happen in the last eight months of the Obama Administration; and what in the world is happening with valuation discounts?

*Ronald D. Aucutt*

11:45 a.m. – 12:45 p.m.



### The UTC Lawyers Panel – Drafting and Administering Trusts Under the New UTC

Now that the new Minnesota Trust Code has been in place for a few months, the panel will discuss key portions of the new law and illustrate its application in numerous fact situations. Issues to be discussed will include applicability of the shorter statute of limitations when a “report” is given to a beneficiary or a representative of a beneficiary; effect of an exculpatory clause under the new law; application of the effective date provisions; use of nonjudicial settlement agreements versus other methods to modify or terminate trusts; use of the notice provisions to shorten a period of contestability of a revocable trust upon the death of the settlor; applicability of the new majority rule provisions; and creditors’ claims against a settlor of a revocable trust.

*William J. Berens, Andrea S. Breckner, David J. Shannon & G. Warren (Kip) Steincross  
Christopher B. Hunt, moderator*

12:45 p.m.

CONFERENCE ADJOURNS

# FACULTY & PLANNERS

• **Peter S. Hatinen**  
**Probate and Trust Law**  
**Section Chair**  
Faegre Baker Daniels LLP  
Minneapolis

**Judge Jamie L. Anderson**  
Hennepin County District Court  
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**Ronald D. Aucutt**  
McGuire Woods LLP  
McLean, Virginia

• **Andrew M. Baese**  
Briggs and Morgan, P.A.  
Saint Paul

**M. Abigail Barrett, M.A., L.P.**  
Leadership Transitions, Inc.  
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**Chad Baruch**  
Johnston Tobey, P.C.  
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**Melissa Hagstrum Bayne**  
Larkin Hoffman Daly & Lindgren Ltd.  
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**John R. Bedosky**  
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**Randy F. Boggio**  
Maser, Amundson, Boggio & Hendricks, P.A.  
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**Lisa J. Bowen**  
Thornton, Reif, Dolan, Bowen  
and Klecker, P.A.  
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**Katherine A. Charipar**  
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Marquette Asset Management  
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**Eileen M. Day**  
Stinson Leonard Street LLP  
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• **Daniel R. Donovan**  
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Private Wealth Management  
New York, New York

**Judge B. William Ekstrum**  
Tenth Judicial District  
Stillwater

**Gerri Gibbs**  
Charles Schwab  
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**Rachel M. Knutson**  
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**Joseph S. Lawder**  
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• **Susan J. Link**  
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**Lisa MacDonald**  
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**Robert A. McLeod**  
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**Holly L. Malcomson**  
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**Rodney J. Mason**  
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**Sonny F. Miller**  
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