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2019
DRAFTING WILLS & TRUST AGREEMENTS FORMS
SERIES

DECEMBER 3 & 10, 2019
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1. **Drafting for Married Couples with Young Children** [3040-20]
   ☐ **LIVE:** Dec. 3, 2019 ☐ **MPLS REPLAY:** Dec. 19, 2019
2. **Drafting for Married Couples with Older Children** [3041-20]
   ☐ **LIVE:** Dec. 3, 2019 ☐ **MPLS REPLAY:** Dec. 19, 2019
3. **Drafting for Retired Couples with Adult Children and Grandchildren** [3042-20]
   ☐ **LIVE:** Dec. 10, 2019 ☐ **MPLS REPLAY:** Jan. 6, 2020
4. **Drafting for Unmarried Individuals or Couples** [3043-20]
   ☐ **LIVE:** Dec. 10, 2019 ☐ **MPLS REPLAY:** Jan. 6, 2020

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Providing valuable insights on the complex issues facing estate planning attorneys today.

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4 Helpful Seminars – Attend In-Person or Via Live Webcast

TUESDAY, DECEMBER 3, 2019

1. **Drafting for Married Couples with Young Children**
2. **Drafting for Married Couples with Older Children**

TUESDAY, DECEMBER 10, 2019

3. **Drafting for Retired Couples with Adult Children and Grandchildren**
4. **Drafting for Unmarried Individuals or Couples**

Attend in-person at
Minnesota CLE Conference Center, Minneapolis
In-person replays also available.

Practical Estate Planning and Drafting Instruction

1 Drafting for Married Couples with Young Children

IN-PERSON LIVE & LIVE WEBCAST:
Tuesday, December 3, 2019

IN-PERSON REPLAY:
Minneapolis – December 19, 2019 (Check-In 8:30; Replay 9:00)

This session will focus on planning for a young married couple with young children that is beginning to accumulate assets but whose largest asset at death is likely to be life insurance.

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

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

General Topics

- When to Use Revocable Trusts or Wills
- Trusts for Children: How to Structure, Things to Consider, Nominating Trustees
- Independent Trustees vs. Beneficiary Trustees
- Handling Vacation Properties
- Editing/Removing DWTA Paragraphs

DWTA Forms to be Discussed

- Will with Trusts
- Disclaimer Will
- Revocable Trust with Disclaimer
- Joint Revocable Trust
- Amendments/Codicils
- Statutory Short Form POA/Common Law POA
- Irrevocable Life Insurance Trust
- Single Beneficiary Gift Trust ("Crummey")
- Nomination of Guardian

– *Maggie D. Green*
Donohue Green Law Office, PLLC; Minneapolis
– *Diana L. Marianetti*
Maslon LLP; Minneapolis
– *Seth A. Nielsen*
Heyley, Duncan & Melander, PLLC; Minneapolis
– *Jayne E. Sykora*
Sykora & Santini PLLC; Minneapolis

Seminar does not include the forms discussed.
Seminar materials will be the difficult, confusing, clauses from each of the forms to be discussed, as well as practice points related to the type of client that is the subject of each panel.

2 Drafting for Married Couples with Older Children

IN-PERSON LIVE & LIVE WEBCAST:
Tuesday, December 3, 2019

IN-PERSON REPLAY:
Minneapolis – December 19, 2019 (Check-In 12:30; Replay 1:00)

This session will focus on an older married couple with older children who have accumulated some assets, including taxable and tax-deferred investments, real estate, and life insurance. They are a blended family with children from previous marriages who are in their late teens or early 20s.

12:30 – 1:00 p.m. CHECK-IN

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

General Topics

- Marital Deduction Formulas
- QTIPs vs. Outright Marital Gifts
- Powers of Appointment
- Rearranging the Client's Balance Sheet
- How to Fund Trusts
- Dealing with Addiction and Other Issues with Children
- Trustee Selection
- Trusts for Lifetime Gifting
- Provisions Allowed by the UTC (directed trusts, decanting, silent trusts, etc.)

DWTA Forms to be Discussed

- Maritalized Family Trust Will
- Maritalized Revocable Trust
- Silent Trusts
- Trust Protectors
- Irrevocable Life Insurance Trust
- Single Beneficiary Gift Trust ("Crummey")
- Revocable Trust for Retirement Plan Benefits

– *Andrea S. Breckner*
Olson & Breckner, P.A.; Minneapolis
– *Michael P. Sampson*
Maslon LLP; Minneapolis
– *Cameron R. Seybolt*
Fredrikson & Byron, P.A.; Minneapolis

Seminar does not include the forms discussed.
Seminar materials will be the difficult, confusing, clauses from each of the forms to be discussed, as well as practice points related to the type of client that is the subject of each panel.

3 Drafting for Retired Couples with Adult Children and Grandchildren

IN-PERSON LIVE & LIVE WEBCAST:
Tuesday, December 10, 2019

IN-PERSON REPLAY:
Minneapolis – January 6, 2020 (Check-In 8:30; Replay 9:00)

This session will focus on clients who are retired with adult children and some grandchildren. They are taking required minimum distributions from their retirement assets and living off of their investments. They are beginning to focus on planning for their own incapacity. Some of their children and grandchildren have struggled with chemical dependency or mental health issues.

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

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

General Topics

- Marital Deduction Formulas
- Family Trust or Disclaimer Trust
- QTIPs vs. Outright Marital Gifts
- Powers of Appointment
- Trustee Selection
- Dealing with Addiction and Other Issues with Children
- How to Balance Estates/Fund Trusts
- Independent Trustees vs. Beneficiary Trustees
- Tax Apportionment
- Handling Vacation Properties

DWTA Forms to be Discussed

- Maritalized Family Trust Will
- Maritalized Revocable Trust
- Joint Revocable Trusts
- Irrevocable Life Insurance Trust
- Single Beneficiary Gift Trust ("Crummey")
- Amendments/Codicils

– *Laura E. Halferty*
Stinson LLP; Minneapolis
– *Jennifer A. Lammers*
Briggs & Morgan PA; Minneapolis
– *Robert E. Lynn*
Bartley & Lynn LLP; Northfield
– *Michael P. Sampson*
Maslon LLP; Minneapolis

Seminar does not include the forms discussed.
Seminar materials will be the difficult, confusing, clauses from each of the forms to be discussed, as well as practice points related to the type of client that is the subject of each panel.

4 Drafting for Unmarried Individuals or Couples

IN-PERSON LIVE & LIVE WEBCAST:
Tuesday, December 10, 2019

IN-PERSON REPLAY:
Minneapolis – January 6, 2020 (Check-In 12:30; Replay 1:00)

This session will focus on clients who are unmarried for one reason or another. They might be young or older, working or retired, wealthy or less so. They might or might not have children. They might want to provide for other family members, including parents, siblings, or nieces and nephews. They might be committed to charitable causes. What they have in common is that their options are open and standardized forms often do not work for their situations.

12:30 – 1:00 p.m. CHECK-IN

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

General Topics

- Drafting Customized Provisions
- Gifts to Charities
- Education Trusts
- Trusts for Nieces and Nephews
- Dealing with Lapses
- Trustee Selection
- Tax Apportionment
- Editing/Removing Paragraphs
- Whether to Use a Revocable Trust or a Will

DWTA Forms to be Discussed

- Basic Will
- Revocable Trust for a Single Person
- Revocable Trust for Retirement Plan Benefits
- Statutory Short Form POA/Common Law POA

– *J. Steve Nys*
Fryberger, Buchanan, Smith & Frederick, P.A.; Duluth
– *Jennifer S. Santini*
Sykora & Santini PLLC; Minneapolis
– *Jayne E. Sykora*
Sykora & Santini PLLC; Minneapolis
– *Ruthanne Hedstrom Vos*
Mathison & Vos PLLC; Grand Marais

Seminar does not include the forms discussed.
Seminar materials will be the difficult, confusing, clauses from each of the forms to be discussed, as well as practice points related to the type of client that is the subject of each panel.

COURSE INFORMATION

SEMINAR LOCATIONS

- **In-Person Live Seminars**
  Minnesota CLE Conference Center
  600 Nicollet Mall, Suite 370, Minneapolis
- **Live Webcasts**
  Webcasts are viewed online at www.minncle.org.
- **In-Person Replays**
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  600 Nicollet Mall, Suite 370, Minneapolis
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CREDITS
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