

# Your Shortcut to Mastering **50** Key Estate Planning, Probate and Trust Law Cases!

**Do you know the most important cases in estate planning, probate, and trust law?**

**Are you sure?**

Our expert faculty will dive deep into 50 significant cases and explain the holdings and analysis as well as when decided to your advantage.

Cases analyzed 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, Estate of Kinney, Matthews, Congdon, Sangren, Stisser, Torgerson, Kremer, Reay's Estate, Wilson's Estate* and many more!



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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Your Success Is Our Goal

# The Estate Planning, Probate & Trust Law **50**

*The 50 Cases Every Estate  
Planning, 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 50 cases.

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

Simplify your legal research with 50 handy shortcut case summaries in 13 key areas in estate planning, probate and trust law. It's the fastest way to ensure the key cases you cite actually mean what you think they mean!

**FRIDAY, FEBRUARY 21, 2020**  
**MINNESOTA CLE CONFERENCE CENTER**  
**MINNEAPOLIS**

Plus 11 in-person replays! Details inside.

# The Estate Planning, Probate & Trust Law **50**

*The 50 Cases Every  
Estate Planning,  
Probate & Trust Lawyer  
Must Know Inside And Out*

**Friday, February 21, 2020**

Plus 11 in-person replays! Details inside.

# SCHEDULE

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

8:55 – 9:00 a.m.  
WELCOME & INTRODUCTION  
– Katherine A. Charipar, Course Co-Chair  
– Diana L. Marianetti, Course Co-Chair

9:00 – 9:20 a.m.  
**Trust Creation/Public Policy**  
*In re Bush's Trust, Larkin v. McCabe, and more!*  
– Amanda N. Juelson

9:20 – 9:40 a.m.  
**Trust Construction**  
*In Re Trusteeship Under Agreement with Mayo, In re Trust Under Agreement by Wiedemann, and more!*  
– Julian Zebot

9:40 – 10:30 a.m.  
**Trustee Duties**  
*Margolis, Great Northern Iron Ore Props, and more!*  
– Joseph J. Cassioppi

10:30 – 10:45 a.m.  
BREAK

10:45 – 11:05 a.m.  
**Grantor Trust Status and Disregarded Sales**  
*PLR 201949015, Madorn v. C.I.R., and more!*  
– Cameron R. Seybolt

11:05 a.m. – 12:00 p.m.  
**Gifting Cases**  
*Estate of Bongard v. Commissioner, Commissioner of Internal Revenue v. Procter, and more!*  
– Matthew J. Shea  
– Edward H. Tully

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

1:00 – 1:20 p.m.  
**Antenuptial Agreements and Spousal Maintenance Waivers**  
*Estate of Kinney, Kremer, and more!*  
– Katherine A. Charipar

1:20 – 1:40 p.m.  
**Probate Court Jurisdiction and Venue**  
*Congdon, Sangren, and more!*  
– Charles K. Maier

1:40 – 2:00 p.m.  
**Personal Representative and Trustee Fees**  
*Stisser, and more!*  
– Casey D. Marshall

2:00 – 2:45 p.m.  
**Contesting a Will**  
*Reay's Estate, Wilson's Estate, and more!*  
– Joy Reopelle Anderson  
– Brian A. Dillon

2:45 – 3:00 p.m.  
BREAK

3:00 – 3:20 p.m.  
**Testator Intent and Extrinsic Evidence**  
*In the Matter of the Trusts Created in and by the Last Will and Testament of Hartman, and more!*  
– Denise S. Rahne

3:20 – 3:40 p.m.  
**Elective Share Rights/Effect of Divorce**  
*Lincoln Benefit, Mony v. Ericson, and more!*  
– Joshua C. Hillger

3:40 – 4:00 p.m.  
**Disclaimers**  
*In re Bowman Trust ex re. McCourt, and more!*  
– Emily A. Unger

4:00 – 4:20 p.m.  
**Income Tax**  
*Fielding, v. Kaestner 1992 Family Trust, and more!*  
– Andrew T. Howard

4:20 – 4:30 p.m.  
**Questions & Answers**

# FACULTY

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# COURSE INFORMATION

**IN-PERSON LIVE SEMINAR**  
**Minneapolis – 2/21/20**  
Minnesota CLE Conference Center  
600 Nicollet Mall, Suite 370  
Third Floor City Center

**IN-PERSON REPLAYS**  
In-person replay times may differ from the live presentation. Check-in and start times are as indicated below.

**Minneapolis – 3/4/20**  
**Minneapolis – 3/20/20**  
(Check-In 8:30; Replay 9:00)  
Minnesota CLE Conference Center  
600 Nicollet Mall, Suite 370  
Third Floor City Center

**Alexandria – 3/27/20**  
(Check-In 8:30; Replay 9:00)  
Douglas County Courthouse  
305 Eighth Avenue West  
Jury Assembly Room

**Duluth – 3/20/20**  
(Check-In 8:30; Replay 9:00)  
Pier B Resort, Pilot House Boardroom  
800 West Railroad Street

**Mankato – 3/27/20**  
(Check-In 9:00; Replay 9:15)  
Farrish Johnson Law Office  
1907 Excel Drive

**Moorhead – 4/9/20**  
(Check-In 9:00; Replay 9:15)  
Moorhead Public Library  
118 Fifth Street South

**Rochester – 3/24/20**  
(Check-In 8:30; Replay 9:00)  
Samaritan Bethany  
24 Eighth Street Northwest

**St. Cloud – 4/7/20**  
(Check-In 8:15; Replay 8:30)  
Rinke Noonan Law Firm  
1015 West St. Germain Street

**Virginia – 3/27/20**  
(Check-In 8:30; Replay 9:00)  
Sipila Law Office  
412 First Street South

**Walker – 4/17/20**  
(Check-In 8:30; Replay 9:00)  
Cass County Courthouse  
300 Minnesota Avenue

**Willmar – 4/3/20**  
(Check-In 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 **6.0 standard CLE credits**.

**ACCOMMODATION**  
If you have a disability and need an accommodation in order to attend, please contact us 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 before the seminar will receive a full credit on their account, or refund upon request. Paid registrants who do not cancel and are unable to attend will retain access to the seminar materials through their website account. Passholders may purchase the materials for 50% of the full retail price.

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# The Estate Planning, Probate & Trust Law 50

Friday, February 21, 2020  
Minnesota CLE Conference Center

PLEASE "✓" APPROPRIATE BOX BELOW:

**IN-PERSON LIVE – 2/21/20:**  
 \$195 MSBA member  \$195 paralegal  \$245 standard rate

**IN-PERSON REPLAY:**  
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Location \_\_\_\_\_ Date \_\_\_\_\_

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## FREE TO ALL ATTENDEES:

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.

### Can't Attend? Get the Materials!

You can purchase *The Estate Planning, Probate & Trust Law 50* for \$75 (plus tax and handling) by calling Minnesota CLE at 800-759-8840 or 651-227-8266. Available in hardcopy. Orders will be filled after the live seminar.



**Can't attend on February 21?**

*Attend an in-person replay in Minneapolis or across the state.*