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# PLANNING & DRAFTING FOR THE SMALL ESTATE

THURSDAY, NOVEMBER 19, 2020  
ATTEND ONLINE

ONLINE PROGRAM:  
THURSDAY, NOVEMBER 19, 2020

Registration must be made online at [www.minncle.org](http://www.minncle.org)

#### TUITION:

\$175 MSBA member

\$175 paralegal

\$195 standard rate

Passholders attend at no charge.

#### In-Person Passholders –

You also may use your Pass to register for this online program at no charge.

#### NEW LAWYER DISCOUNT!

New lawyers who have been admitted to the bar fewer than 3 years receive a 50% discount.

#### SCHOLARSHIPS AVAILABLE

Minnesota CLE maintains a scholarship program for those individuals with a financial need. To obtain a scholarship application, contact Grant at [gdavies@minncle.org](mailto:gdavies@minncle.org).

#### JOIN THE MSBA AND PAY LESS FOR MINNESOTA CLE SEMINARS!

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#### CAN'T ATTEND? GET THE COURSE MATERIALS!



You can purchase the materials for \$90 (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 seminar.

## COURSE INFORMATION

#### ONLINE PROGRAM

Thursday, November 19, 2020

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

Registration for live webcast must be made online at [www.minncle.org](http://www.minncle.org)

#### IN-PERSON PASSHOLDERS

You may use your Pass to register for the online program at no charge.

#### COURSE MATERIALS

All course materials will be provided electronically.

#### CREDITS

Minnesota CLE is applying to the State Board of CLE for **5.75 standard CLE credits**. The maximum number of credits attendees may claim for this course is 5.75 credits.

#### SCHOLARSHIPS AVAILABLE

Minnesota CLE maintains a scholarship program for those individuals with a financial need. For more information or to obtain a scholarship application, contact Grant at [gdavies@minncle.org](mailto:gdavies@minncle.org).

#### CANCELLATION POLICY / NO-SHOW POLICY

Paid registrants who cancel before the program 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 at 50% of the full retail price.

#### ACCOMMODATION

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

#### QUESTIONS?

[customerservice@minncle.org](mailto:customerservice@minncle.org)  
[www.minncle.org](http://www.minncle.org)  
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Minnesota Continuing Legal Education  
Your Success Is Our Goal

**LIVE ONLINE!**  
**NOVEMBER 19, 2020**

No In-Person Attendance

#### In-Person Passholders –

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# PLANNING & DRAFTING FOR THE SMALL ESTATE

*It's Not So Small Anymore!*

**A Practical Seminar Taught by and for Solo and Small Firm Attorneys Who Work with Small Estates**

#### HIGHLIGHTS INCLUDE:

- How to Conduct an Effective **Client Intake**
- How to Resolve Problems and Issues Surrounding **Life Insurance** in Estate Planning
- What You Need to Know about **Beneficiary Designations**
- 6 Things You and Your Client Need to Know about **Powers of Attorney**
- 5 Key Points to Know about **Medical Assistance Eligibility**
- **And much, much more!**

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

# SCHEDULE

8:30 – 8:55 a.m.

JOIN ONLINE

8:55 – 9:00 a.m.

## Introduction and Welcome

– *Jody A. Cohen Press, Course Chair*

9:00 – 10:00 a.m.

## The Initial Meeting: “Getting to Know You”

Five topics you must address in your initial client meeting: dual/multi-party representation; retainer agreements/engagement letters; probate assets vs. non-probate assets; wills vs. trusts; and incapacity planning.

– *Jody A. Cohen Press*

– *Steven M. Press*

10:05 – 10:50 a.m.

## The “Gotchas” and “Trap Doors” of Life Insurance

A discussion of the problems and issues surrounding life insurance in estate planning, including an analysis of how and why policies fail and the impact to a client's estate and beneficiaries.

– *Robert L. Cohen*

10:50 – 11:05 a.m. BREAK

11:05 a.m. – 12:05 p.m.

## No Such Thing as a Basic Will: Guiding Those Who Don't Know What They Don't Know

- Will formalities and legalities, including COVID-related legislative changes.
- Drafting testamentary trusts.
- Choosing corporate vs. individual fiduciaries.
- Considerations in drafting a pot trust vs. separate share trusts.
- Planning for tangible personal property and digital assets.
- Considerations in drafting a codicil vs. a new will.
- Tips for drafting for minors and incapacitated beneficiaries.

– *Philip J. Ruce*

12:10 – 12:40 p.m.

## How to Draft Beneficial Beneficiary Designations

The importance of reviewing and updating beneficiary designations. Discussion of the Minnesota Multiparty Accounts Act; Revocation of Beneficiary Designation by Marriage Dissolution (Minn. Stat. §524.2-804 and Sveen v. Melin); and Rights of Survivorship (Minn. Stat. §524.6-204 and Estate of Patrick W. Butler).

– *Carol S. Cooper*

12:40 – 1:15 p.m. LUNCH BREAK

1:15 – 1:45 p.m.

## Understanding Transfer on Death Deeds: To TODD or Not to TODD?

How to draft a TODD, when to draft a TODD and when *not* to draft a TODD.

– *Suzanne M. Sandahl*

1:50 – 2:35 p.m.

## Understanding Advanced Directives for Health Care and End of Life

Comparing and contrasting Health Care Directives, DNR/DNI forms, POLST's and the Caregiver Act, including the interplay in theory and practice between these documents. Also, practical tips on helping clients overcome barriers to completing their directives.

– *Mary Frances M. Price*

2:35 – 2:50 p.m. BREAK

2:50 – 3:20 p.m.

## A Birds-Eye View of Medical Assistance: 5 Key Points about M.A. Eligibility

Key points to know about Medical Assistance eligibility, including statutory references, applicable law and estate recovery.

– *Jill M. Sauber*

3:25 – 4:10 p.m.

## Understanding the Available Powers of Attorney: “A-N” and Beyond

Understanding the powers and limitations of Attorneys-in-Fact. Selecting the right people for the job and remedies when things go wrong.

– *Emily Valentine-Grimm*

4:10 p.m. ADJOURN

# FACULTY

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