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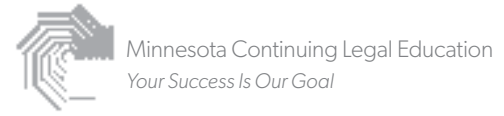
BONUS MATERIALS!

All attendees will receive electronic versions of the recently updated *Trust Administration Checklists for an Individual Trustee* and the *Trusts Legal QuickSheet™*. These helpful and concise at-a-glance reference tools include formatted charts, diagrams, and checklists to have at the ready to clarify legal issues quickly and visually.



Strategic Trust Planning and Administration – Beyond the Basics

ONLINE ONLY
 Thursday, August 12, 2021



Strategic Trust Planning and Administration – Beyond the Basics

Learn time-tested techniques and the latest strategies for drafting and administering trusts



Our expert faculty will explain:

- How the SECURE Act Impacts Your Clients, Their Trusts and Their Retirement Assets
- What the Professional Fiduciary Wishes the Attorney Would Think of When Drafting a Trust
- How to Fund the Client's Revocable Trust
- The Nuances of Irrevocable Trusts
- How to Establish and Administer Supplemental and Special Needs Trusts
- And much more!

ONLINE ONLY
 Thursday, August 12, 2021

In-Person Passholders – You may use your Pass to register for the online seminar at no charge.

Register today at www.minncle.org

SCHEDULE

8:25 – 8:55 a.m. JOIN ONLINE

8:55 – 9:00 a.m.

Welcome & Introduction

– Courtney Sebo Savica
Course Co-Chair

9:00 – 9:45 a.m.

Confident and SECURE: How the SECURE Act Impacts Your Clients, Their Trusts, and Their Retirement Assets

The SECURE Act will generate trillions of dollars in revenue for the federal government through the increased taxation of qualified retirement assets. Thus, the SECURE Act will impact the estate plan of anyone with a qualified retirement asset. In this session, attorneys Mark E. Utz and Courtney Sebo Savica will provide an easy-to-follow guide on how to explain the SECURE Act to clients, how to work with clients with qualified retirement assets, and how to create an air-tight estate plan in the aftermath of the SECURE Act.

– Courtney Sebo Savica
Mark E. Utz

9:45 – 9:50 a.m. BREAK

9:50 – 10:50 a.m.

What Professional Fiduciaries Would Like Attorneys to Consider When Drafting Trusts

Trusts are tools used by attorneys to ensure their client’s wishes and objectives will be met both now and in the future. It is then the responsibility of the trustee to fulfill those wishes and objectives. However, sometimes the language of the trust is ambiguous, or the terms are difficult to administer. Join our panel of experienced corporate trustees as they discuss their perspectives on administering trusts. Specifically, the panel will address notice provisions, restrictive investment language and other key trusts terms.

– Andrea H. Chan
Kiley E. P. Henry
Eric G. Jonsgaard
Julie A. Westbrock (Moderator)

10:50 – 11:00 a.m. BREAK

11:00 – 11:45 a.m.

Funding a Client’s Revocable Trust

This session will explore how, why, and with what to fund your client’s revocable trust. This session will go beyond the basics and will explore some advanced trust funding strategies for 401ks, IRAs, and other assets. Learn best practices for funding a trust and the steps needed to ensure that trust assets are properly titled and transferred to the trust.

– Diana L. Marianetti

11:45 – 11:50 a.m. BREAK

11:50 a.m. – 12:35 p.m.

Establishing and Administering Supplemental and Special Needs Trusts

Typically, estate planning perspectives are directly related to death or dying. However, for families with children with disabilities, the perspective is more properly related to life planning. Supplemental Needs Trusts and Special Needs Trusts can be used to benefit people with disabilities by supplementing and managing their resources while maintaining their eligibility for public assistance benefits. Learn the differences and special uses for these two trusts. Also, this session will address drafting and funding considerations as well as issues regarding administration.

– Brenna M. Galvin

12:35 – 1:05 p.m. LUNCH BREAK

1:05 – 1:50 p.m.

Understanding the Nuances of Irrevocable Trusts – Seize the Opportunity but Also Know the Risks

Irrevocable trusts are an essential part of estate planning, asset protection, and tax avoidance planning. Once only a tool for the wealthy, irrevocable trusts, and the protections they provide, are now available to everyone. However, there are many important considerations when establishing an irrevocable trust. This session will explore circumstances that may trigger the need for an irrevocable trust, and what assets are appropriate for funding an irrevocable trust. Also, this session will discuss best practices for administering irrevocable trusts, as well as examine two recent Minnesota cases discussing how the county/DHS treats assets held in an irrevocable trust for Medical Assistance benefits.

– Beth T. Morrison
Jill M. Sauber

1:50 – 1:55 p.m. BREAK

1:55 – 2:25 p.m.

Fiduciary Income Tax Refresher – Top 5 Tax Planning Tips for Drafting and Administering Trusts

In this session, learn from a CPA on the tax saving strategies available with various types of trusts. Also, refresh your knowledge on the tools available to save income tax overall when considering the overall income taxes for the trust, estate, or beneficiaries.

– Derek M. Dockendorf

2:25 – 2:35 p.m. BREAK

2:35 – 3:20 p.m.

Selecting the Right Trust for Your Client: A Scenario-Based Discussion

As every estate planner knows, trusts are an effective way to protect assets. However, the hard part is knowing what kind of trust to set up and how to do it, especially when the client has a complex estate or unique assets that need protection. In this scenario-based session our experienced panelists will explore more advanced-level trust planning, which trusts work best for whom and mistakes to avoid.

– Amanda N. Juelson
Serena O’Neil
Maria D. Plese
Philip J. Ruce (Moderator)

3:20 – 3:25 p.m. BREAK

3:25 – 4:25 p.m.

Elimination of Bias – How to Have a More Dementia-Friendly Law Practice

1.0 elimination of bias credit applied for

While dementia is certainly not a new medical condition, research and the statistical upswing of its presence in the general population make this disease something all attorneys need to know more about. To better serve their clients, attorneys should be able to identify the difference between “normal aging” and dementia symptoms. How diminished is your client’s capacity – and is an attorney expected to acquire medical expertise to deal with the elderly? What are the professional and ethical responsibilities of attorneys when they have reason to believe their client has diminished capacity? Our panel of experienced elder law attorneys and a social worker will address these questions and provide general practice tips for advising a client with dementia.

– Maya E. Missaghi (Moderator)
Anita Raymond
Ruthanne Hedstrom Vos

COURSE INFORMATION

ONLINE PROGRAM

Thursday, August 12, 2021
View online at www.minncle.org
Registration for online program must be made online at 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 Minnesota State Board of CLE for **6.25 CLE credits, including 1.0 elimination of bias credit**. The maximum number of total credits attendees may claim is 6.25 credits.

SCHOLARSHIPS AVAILABLE

Minnesota CLE maintains a scholarship program for those with a financial need. Contact Grant at gdavies@minncle.org or **651-254-2111** for further details or to obtain an application.

ACCOMMODATION

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

CANCELLATION POLICY / 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 at 50% of the full retail price.

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Strategic Trust Planning and Administration – Beyond the Basics

THURSDAY, AUGUST 12, 2021
ATTEND ONLINE

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THURSDAY, AUGUST 12, 2021

Registration must be made online at www.minncle.org

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\$245 paralegal

\$295 standard rate

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