

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

# 2021 DRAFTING WILLS & TRUST AGREEMENTS SERIES: A REVIEW OF EVERY FORM

DECEMBER 6 & 16, 2021  
ATTEND ONLINE – NO IN-PERSON ATTENDANCE

## ONLINE PROGRAMS – December 6 & 16, 2020

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

## TUITION FOR EACH SESSION:

\$155 MSBA member  
\$155 paralegal  
\$175 standard rate

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

**NEW LAWYER DISCOUNT!**  
New lawyers admitted to  
the bar fewer than 3 years  
receive a 50% discount.

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

## MONDAY, DECEMBER 6, 2021

- 1 **Chapters 1-8:  
The Fundamentals** [3941-22]
- 2 **Chapters 9-15:  
Trusts and Miscellaneous Clauses** [3942-22]

## THURSDAY, DECEMBER 16, 2021

- 3 **Chapters 16-23:  
Adding to the Plan** [3943-22]
- 4 **Chapters 24-32:  
Unique Situations** [3945-22]

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

To join the MSBA go to [www.mnbar.org](http://www.mnbar.org)  
Or for more membership advantages call **1-800-882-6722**

### CAN'T ATTEND?

To order a hard copy of the **Drafting Wills and Trusts Agreements Deskbook** call Minnesota CLE at 800-759-8840.  
To purchase the LinkedLaw (online) version of the Deskbook, subscribe to the LinkedLaw Deskbook PREMIUM Library at [www.minncle.org/publication/62000720](http://www.minncle.org/publication/62000720)

[hgl/bcb/chj/mkl | PAje]

Nonprofit Org.  
U.S. Postage  
PAID  
Minnesota Continuing  
Legal Education

Minnesota Continuing  
Legal Education  
2550 UNIVERSITY AVE W #160-S, SAINT PAUL, MN 55114



DATED MATERIAL – PLEASE EXPEDITE!



# 2021 DRAFTING WILLS & TRUST AGREEMENTS SERIES: A REVIEW OF EVERY FORM

4 helpful half-day seminars  
focusing on each form in  
the Drafting Wills and Trust  
Agreements Deskbook

**DECEMBER 6 & 16, 2021**

**LIVE ONLINE ONLY –  
No in-person attendance**



Minnesota Continuing  
Legal Education  
*Your Success Is Our Goal*

**LIVE ONLINE ONLY –  
No in-person attendance**  
*In-person Passholders – You may use your  
Pass to register for the online seminars.*

# 2021 DRAFTING WILLS & TRUST AGREEMENTS SERIES: A REVIEW OF EVERY FORM

4 helpful half-day seminars focusing on  
each form in the Drafting Wills and Trust  
Agreements Deskbook

## MONDAY, DECEMBER 6, 2021: VOLUME I

- 1 **Chapters 1-8: The Fundamentals**
- 2 **Chapters 9-15: Trusts and Miscellaneous Clauses**

## THURSDAY, DECEMBER 16, 2021: VOLUME II

- 3 **Chapters 16-23: Adding to the Plan**
- 4 **Chapters 24-32: Unique Situations**

## 1 VOLUME I Chapters 1-8: The Fundamentals

**LIVE ONLINE:**  
**Monday, December 6, 2021** (Sign-in: 8:30; Program 9:00)

8:30 – 9:00 a.m. JOIN ONLINE

### 9:00 – 10:30 a.m. **Questionnaire, Engagement Agreement, Powers of Attorney, Health Care Directive, Nomination of Guardian**

Panelists will discuss and review best practices:

- The questionnaire, how they use the questionnaire in practice, options to add or subtract from the form
- Engagement Agreement, fee structures
- Powers of Attorney: when to use a short form POA vs. general POA
- Health Care Directive: long form vs. short form
- Nomination of guardian: when to use a POA to appoint a guardian of a minor vs. designation of standby/temporary custodian

10:30 – 10:45 a.m. BREAK

### 10:45 a.m. – 12:15 p.m. **Will, Will with Trusts, Marital Deduction, Disclaimer Will, Maritalized Will**

Panelists will discuss which types of clients/situations for each type of Will, importance of the marital deduction, estate tax considerations.

- *Andrea S. Breckner*  
*Olson & Breckner, P.A.; Minneapolis*
- *Robert Lynn*  
*Bartley & Lynn LLP; Saint Paul*
- *Michael P. Sampson*  
*Maslon LLP; Minneapolis*
- *Jennifer Santini*  
*Sykora & Santini PLLC; Minneapolis*

**Seminar does not include the forms discussed.**

Seminar materials will be the difficult and confusing clauses from each of the forms to be discussed, as well as practice pointers related to the type of client that is the subject of each panel.

## 2 VOLUME I Chapters 9-15: Trusts and Miscellaneous Clauses

**LIVE ONLINE:**  
**Monday, December 6, 2021** (Sign-in: 12:30; Program 1:00)

12:30 – 1:00 p.m. JOIN ONLINE

### 1:00 – 2:30 p.m. **Will vs. Trust, Revocable Trust, Revocable Trust with Disclaimer, Maritalized Revocable Trust**

Panelists will discuss considerations for using Wills vs. Trusts.

2:30 – 2:45 p.m. BREAK

### 2:45 – 4:15 p.m. **Joint Revocable Trust, Pour-Over Will, Miscellaneous Clauses**

Panelists will discuss when to use a Joint Revocable Trust vs. Single Revocable Trust, importance of a Pour-Over Will when utilizing trusts and situations and practice pointers for miscellaneous clauses.

- *Scott Ruhsam*  
*Kennedy and Ruhsam Law Offices, PA; Eagan*
- *Jayne 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 and confusing clauses from each of the forms to be discussed, as well as practice pointers related to the type of client that is the subject of each panel.

## 3 VOLUME II Chapters 16-23: Adding to the Plan

**LIVE ONLINE:**  
**Thursday, December 16, 2021** (Sign-in: 8:30; Program 9:00)

8:30 – 9:00 a.m. JOIN ONLINE

### 9:00 – 10:30 a.m. **Miscellaneous Documents, Miscellaneous Trust Documents, Beneficiary Designations, Disclaimers**

Panelists will discuss considerations when to use a codicil, Spousal Consent/Waiver to Will and International Will certificates; the importance of miscellaneous trust documents to complete a trust estate plan; and the significance of beneficiary designations to complete any estate plan.

10:30 – 10:45 a.m. BREAK

### 10:45 a.m. – 12:15 p.m. **QDOT, QPRT (no longer updated), Single Beneficiary Gift Trust, ILIT**

Panelists will discuss when a QDOT is needed and considerations around drafting; why a Qualified Personal Residence Trust is no longer updated and potential alternatives to consider; how and when a Single Beneficiary Gift Trust should be utilized; and considerations when drafting an Irrevocable Trust.

- *Andrea S. Breckner*  
*Olson & Breckner, P.A.; Minneapolis*
- *Alison J. Midden*  
*Taft Stettinius & Hollister LLP; Minneapolis*
- *Jayne Sykora*  
*Sykora & Santini PLLC; Minneapolis*

**Seminar does not include the forms discussed.**

Seminar materials will be the difficult and confusing clauses from each of the forms to be discussed, as well as practice pointers related to the type of client that is the subject of each panel.

## 4 VOLUME II Chapters 24-32: Unique Situations

**LIVE ONLINE:**  
**Thursday, December 16, 2021** (Sign-in: 12:30; Program 1:00)

12:30 – 1:00 p.m. JOIN ONLINE

### 1:00 – 2:30 p.m. **Charitable Remainder Trusts (no longer updated), Charitable Lead Trusts (no longer updated), Revocable Trust for Retirement Plan Benefits, Special Needs Trust (no longer updated), Supplemental Needs Trust**

Panelists will discuss common charitable techniques and vehicles for clients and why the forms are no longer being updated; considerations for a Revocable Trust for Retirement Plan Benefits and drafting techniques and options for Supplemental Needs Trusts.

2:30 – 2:45 p.m. BREAK

### 2:45 – 4:15 p.m. **Joint Revocable Cabin Trust, Digital Assets, Antenuptial Agreement (no longer updated), Postnuptial Agreement (no longer updated)**

Panelists will discuss planning for the family cabin; digital assets; pros and cons to Antenuptial and Postnuptial Agreements.

- *J. Steve Nys*  
*Fryberger, Buchanan, Smith & Frederick, P.A.; Duluth*
- *Michael P. Sampson*  
*Maslon LLP; Minneapolis*
- *Courtney Sebo Savica*  
*Excelsior Law Firm LLC; Rochester*

**Seminar does not include the forms discussed.**

Seminar materials will be the difficult and confusing clauses from each of the forms to be discussed, as well as practice pointers related to the type of client that is the subject of each panel.

### ONLINE PROGRAMS

**December 6 & 16, 2021**  
**View online at [www.minncle.org](http://www.minncle.org)**  
Registration for online programs must be made at [www.minncle.org](http://www.minncle.org).

### IN-PERSON PASSHOLDERS

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

### CREDITS

Minnesota CLE has applied to the Minnesota State Board of CLE for **3.0 standard CLE credits for each seminar.**

### ACCOMMODATION

If you have a disability and need an accommodation in order to attend, please contact Minnesota CLE 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 at 50% of the full retail price.

### SCHOLARSHIPS AVAILABLE

Minnesota CLE maintains a scholarship program for individuals with a financial need. To obtain an application, contact Grant at [gdavies@minncle.org](mailto:gdavies@minncle.org) or **651-254-2111**.

### QUESTIONS?

**[www.minncle.org](http://www.minncle.org)**  
**651-227-8266 or 800-759-8840**

Buy the **Drafting Wills and Trust Agreements Deskbook** for 25% off and have all of the forms at your fingertips.

Offer good through January 16, 2022. To order, call Minnesota CLE at 651-227-8266 or 800-759-8840.

