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MINNESOTA CONTINUING  
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NEW SEMINAR

# ESTATE PLANNING FOR THE NON-SPECIALIST

*Spotlighting the Important Estate Planning Matters  
Every Attorney Should Know*



This **brand-NEW seminar** will provide you with an overview of major topics in **estate planning** that can help you tackle these issues and complement your legal practice. Expert estate planning practitioners will discuss:

- Understanding Important **Estate Planning Terms and Concepts**
- **Estate Plan Starter Pack** (and a Few Upgrades)
- **10 Facts** You Should Know about the **Minnesota and Federal Estate Tax**
- **4 Ways** to Transfer **Real Estate** as Part of an Overall **Estate Planning Strategy**
- Estate Planning Strategies for **Business Owners**
- And much more!



**LIVE ONLINE ONLY**  
**February 24, 2022**

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

## SPECIAL OFFER FOR ATTENDEES –

### Save 25% on Drafting Wills & Trust Agreements with eFormbook!

Offering vital information regarding any and every estate plan, this Deskbook with companion eFormbook is an invaluable tool to attorneys across the board and is simply the best resource available on estate planning in Minnesota.

To receive the discount, orders must be placed online at [www.minncle.org](http://www.minncle.org) using the coupon code that will be provided to attendees on the day of the course.

Offer good through March 31, 2022.

REGULAR PRICE: \$499 | SALE PRICE: \$374.25



# ESTATE PLANNING FOR THE NON-SPECIALIST

**LIVE ONLINE**  
**Thursday, February 24, 2022**  
Register at [www.minncle.org](http://www.minncle.org)

# THE SCHEDULE



8:30 – 9:00 a.m. [JOIN ONLINE](#)

9:00 – 10:00 a.m.

## Understanding Important Estate Planning Terms and Concepts

Estate planning is the process of making it clearly known, in the event of a person's death or incapacity, who is in charge of decision-making and how assets should pass. This session will take a look at the key terms and concepts related to estate planning and probate – and explain how they function in estate law.

– *Tara D. Mattesich*

10:00 – 10:05 a.m. [BREAK](#)

10:05 – 11:05 a.m.

## Estate Plan Starter Pack (and a Few Upgrades)

As mentioned in the first session, there are many important legal documents you should consider drafting when preparing an estate plan. This session will review the estate plan starter pack, or core estate planning documents, that every estate plan needs – wills, power of attorneys, and health care directives. Additionally, this session will introduce additional estate planning documents to consider including trusts, guardianship designation forms, beneficiary designation forms, and letters of intent.

– *Serena O'Neil*

11:05 – 11:20 a.m. [BREAK](#)

11:20 a.m. – 12:05 p.m.

## 10 Facts You Should Know About the Minnesota and Federal Estate Tax

Your clients might be surprised to find out that the Minnesota or federal estate tax applies to their estate. While most estates will not incur federal estate tax because of the high exemption amount (\$12.06 million per person in 2022), the Minnesota exemption amount is much lower (\$3 million). Even if your client's estate is not large enough to owe federal or state estate tax, you will want to understand these laws to properly advise your clients. This session will explain the Minnesota and federal estate tax systems and will provide basic strategies for limiting your client's estate tax exposure.

– *Alison J. Midden*

12:05 – 12:45 p.m. [LUNCH BREAK](#)

12:45 – 1:30 p.m.

## 4 Ways to Transfer Real Estate as Part of an Overall Estate Planning Strategy

Real estate is typically the most valuable asset owned by individuals. Ownership of real estate can take on many forms and conveys specific duties and rights based on that ownership. This session will explore planning strategies for transferring real estate. Topics include:

- Transfer on Death Deeds
- Life Estates
- Revocable Trusts
- Wills

– *Callyn T. Bedker*

1:30 – 1:35 p.m. [BREAK](#)

1:35 – 2:20 p.m.

## Estate Planning Strategies for Business Owners

One of the biggest challenges for business owners is succession and estate planning to ensure their businesses are managed properly during life and upon their death. This session will focus on important things to consider when working with business owners to ensure that their closely-held business succession goals and objectives are met – whether that means transferring it to family during their lifetime or upon their death, selling it to key employees, or selling it to a third-party.

– *Joshua C. Hillger*

2:20 – 2:35 p.m. [BREAK](#)

2:35 – 3:20 p.m.

## Navigating Family Dynamics to Create an Effective Estate Plan

Understanding a family's dynamics in estate planning is very important. When a client comes in the door and asks for a "simple will" many times there is more to it. What begins as a straight forward estate plan can become quite complex. This session will cover common issues that can occur within families and how to plan for them. Specifically, this session will explore tips and best practices when there are multiple marriages, antenuptial agreements, disagreements among family members and the potential complexities surrounding the selection of attorneys in fact, trustees and personal representatives.

– *Courtney R. Sebo Savica*

3:20 – 3:25 p.m. [BREAK](#)

3:25 – 3:55 p.m.

## Top 10 New Developments and Evolving Issues in Estate Planning

This session will highlight major estate planning developments from 2021, including legislative, regulatory, and case law developments. We will address transfer planning in light of legislative uncertainty and the remote possibility of retroactive transfer tax legislation. Further, we will explore evolving issues and trends for 2022.

– *Philip J. Ruce*

3:55 – 4:00 p.m. [BREAK](#)

4:00 – 4:30 p.m.

## 15 Key Resources for Estate Planners

There are many resources available to help you learn the ins and outs of estate planning. Thus, you don't need to start from scratch! Learn the "go to" resources that experienced estate planning attorneys find invaluable in their practice.

– *Richard L. Baum*

## COURSE INFORMATION

### LIVE ONLINE PROGRAM

Thursday, February 24, 2022  
View online at [www.minncle.org](http://www.minncle.org)

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

### COURSE MATERIALS

Materials will be provided electronically.

### CREDITS

Minnesota CLE is applying to the Minnesota State Board of CLE for **6.0 standard CLE credits**. The maximum number of total credits attendees may claim is 6.0 credits.

### SCHOLARSHIPS AVAILABLE

Minnesota CLE maintains a scholarship program for those with a financial need. Contact Grant at [gdavies@minncle.org](mailto: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 800-759-8840 or [customerservice@minncle.org](mailto:customerservice@minncle.org).

### CANCELLATION POLICY / NO-SHOW POLICY

Paid registrants who cancel before the seminar will receive a refund upon request. Paid registrants who do not cancel and are unable to attend will retain access to the seminar materials through their Minnesota CLE website account.

### QUESTIONS?

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# ESTATE PLANNING FOR THE NON-SPECIALIST

Thursday, February 24, 2022  
[Attend Online](#)

ONLINE SEMINAR:  
THURSDAY, FEBRUARY 24, 2022

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

### TUITION:

\$245 MSBA member

\$245 paralegal

\$295 standard rate

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Orders will be filled after the seminar.