

Register today at www.minncle.org

2024 DRAFTING WILLS & TRUST AGREEMENTS FORMS SERIES

Attend In Person

Minnesota CLE Conference Center
600 Nicollet Mall, Suite 370, Minneapolis

Wednesday, February 21, 2024

Proven Practice Pointers for Estate Planning Attorneys
Digital Legacies – Navigating the World of Electronic Wills

[4675-24]
[4676-24]

Tuesday, February 27, 2024

Scenario-Based Estate Planning with *Drafting Wills and Trust Agreements Deskbook* Forms
Navigating the Tax Maze with *Drafting Wills and Trust Agreements Deskbook* Forms

[4677-24]
[4678-24]

Can't attend the live seminars?

View the online replays March 5 & 19, 2024 or March 11 & 22, 2024

www.minncle.org

Register online at www.minncle.org

For assistance, call Minnesota CLE at 651-227-8266 or 800-759-8840 or email customerservice@minncle.org.

TUITION PER COURSE:

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

SEASON PASSHOLDERS:

- **Super Passholders** may attend the in-person seminar or an online replay at no charge.
- **In-Person Passholders** may attend the in-person seminar at no charge or an online replay for 50% off.
- **Online Passholders** may attend the in-person seminar for 50% off or an online replay 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.

JOIN THE MSBA AND PAY LESS FOR MINNESOTA CLE SEMINARS!

To join the MSBA go to www.mnbar.org
Or for more membership advantages call 1-800-882-6722

CAN'T ATTEND? GET THE DESKBOOK!

To purchase a hard copy of the *Drafting Wills and Trusts Agreements Deskbook with eFormbook* at 25% off call Minnesota CLE at 800-759-8840. Offer good until 3/30/24.

To purchase the LinkedLaw (online) version of the Deskbook, subscribe to the LinkedLaw Deskbook PREMIUM Library at www.minncle.org/publication/62000720

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DATED MATERIAL – PLEASE EXPEDITE!



2024
**DRAFTING
WILLS & TRUST
AGREEMENTS**
FORMS SERIES

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

FEBRUARY 21 & 27, 2024

ATTEND IN PERSON



Minnesota Continuing
Legal Education
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2024 DRAFTING WILLS & TRUST AGREEMENTS FORMS SERIES

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

WEDNESDAY, FEBRUARY 21, 2024

- 1 Proven Practice Pointers for Estate Planning Attorneys**
- 2 Digital Legacies – Navigating the World of Electronic Wills**

TUESDAY, FEBRUARY 27, 2024

- 3 Scenario-Based Estate Planning with *Drafting Wills and Trust Agreements Deskbook* Forms**
- 4 Navigating the Tax Maze with *Drafting Wills and Trust Agreements Deskbook* Forms**

In-Depth Discussion of Practical Estate Planning, Drafting Issues, and Considerations

COURSE INFORMATION

1 Proven Practice Pointers for Estate Planning Attorneys

LIVE IN PERSON:

Wednesday, February 21, 2024 (Check-in: 8:30; Program 9:00)

ONLINE REPLAYS:

Tuesday, March 5, 2024 (Check-in: 8:30; Program 9:00)

Tuesday, March 19, 2024 (Check-in: 8:30; Program 9:00)

8:30 – 9:00 a.m. CHECK-IN & CONTINENTAL BREAKFAST

9:00 a.m. – 12:15 p.m. (includes one 15-minute break)

Proven Practice Pointers for Estate Planning Attorneys

At a macro level, the goals, and objectives of estate planning attorneys, whether in a large firm or solo practice, are often largely similar. But despite the overarching similarities, the methods and practices that practitioners employ on a day-to-day basis can vary widely. A panel of experienced estate planning attorneys will discuss, answer questions, and offer pointers in connection with the more practical aspects of estate planning, from intake and engagement to document execution and asset re-titling.

FORMS TO BE DISCUSSED*

- Estate Planning Questionnaire – Short Form
- Estate Planning Questionnaire – Long Form
- Estate Planning Engagement Agreement
- Statutory Short Form – Power of Attorney
- Health Care Directive – Long Form
- Health Care Directive – Short Form
- Suggested Health Care Directive Language for Clients

- Matthew J. Frerichs
Maslon LLP; Minneapolis
- Paula J. Stumne
Bremer Wealth; Minneapolis
- Jayne Sykora
Sykora & Santini PLLC; Minneapolis
- Ruthanne Hedstrom Vos
Mathison & Vos PLLC; Grand Marais

* Seminar materials do 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 Digital Legacies – Navigating the World of Electronic Wills

LIVE IN PERSON:

Wednesday, February 21, 2024 (Check-in: 12:30; Program 1:00)

ONLINE REPLAYS:

Tuesday, March 5, 2024 (Check-in: 12:30; Program 1:00)

Tuesday, March 19, 2024 (Check-in: 12:30; Program 1:00)

12:30 – 1:00 p.m. CHECK-IN

1:00 – 4:15 p.m. (includes one 15-minute break)

Digital Legacies – Navigating the World of Electronic Wills

The Uniform Electronic Wills Act took effect on August 31, 2023. This session will focus on the components of the Act and include a discussion and demonstrations of the practical implications for estate planning attorneys.

FORMS TO BE DISCUSSED*

- All Wills
- Digital Property Authorization for Will or Trust
- Alternative Digital Property Prohibition for a Will
- Authorization and Consent for Release of Electronically Stored Information
- Online Accounts and Digital Asset Organizer

- Cameron R. Kelly
Cummins & Bonestroo Law Office PLLC; Bayport
- J. Steve Nys
Fryberger, Buchanan, Smith & Federick, P.A.; Duluth
- Jayne Sykora
Sykora & Santini PLLC; Minneapolis

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3 Scenario-Based Estate Planning with Drafting Wills and Trust Agreements Deskbook Forms

LIVE IN PERSON:

Tuesday, February 27, 2024 (Check-in: 8:30; Program 9:00)

ONLINE REPLAYS:

Monday, March 11, 2024 (Check-in: 8:30; Program 9:00)

Friday, March 22, 2024 (Check-in: 8:30; Program 9:00)

8:30 – 9:00 a.m. CHECK-IN & CONTINENTAL BREAKFAST

9:00 a.m. – 12:15 p.m. (includes one 15-minute break)

Scenario-Based Estate Planning with Drafting Wills and Trust Agreements Deskbook Forms

In this seminar, a panel of seasoned practitioners will consider several fact patterns and then offer their unique approaches to developing and implementing an estate plan, incorporating the *Drafting Wills and Trust Agreements Deskbook Forms* into the discussion.

FORMS TO BE DISCUSSED*

- Standard Will
- Standard Will with Contingent Trusts
- Disclaimer Will
- Maritalized Will
- Revocable Trust for Single Person
- Revocable Trust with Disclaimer
- Maritalized Revocable Trust
- Drop-In Clauses
- Fiduciary Provisions
- General Governing Provisions
- POAs
- Health Care Directives

- Matthew J. Frerichs
Maslon LLP; Minneapolis
- Paul D. Funke
Funke Law, PLLC; Saint Paul
- Alison J. Midden
Taft Stettinius & Hollister LLP; Minneapolis
- Jennifer S. Santini
Sykora & Santini PLLC; Minneapolis

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4 Navigating the Tax Maze with Drafting Wills and Trust Agreements Deskbook Forms

LIVE IN PERSON:

Tuesday, February 27, 2024 (Check-in: 12:30; Program 1:00)

ONLINE REPLAYS:

Monday, March 11, 2024 (Check-in: 12:30; Program 1:00)

Friday, March 22, 2024 (Check-in: 12:30; Program 1:00)

12:30 – 1:00 p.m. CHECK-IN

1:00 – 4:15 p.m. (includes one 15-minute break)

Navigating the Tax Maze with Drafting Wills and Trust Agreements Deskbook Forms

A panel of experts will discuss the various tax-related provisions in the *Drafting Wills and Trust Agreements Deskbook Forms* and offer their insights on various aspects of estate tax (including tax apportionment), generation skipping transfer tax, income tax, and fiduciary income tax.

FORMS TO BE DISCUSSED*

- Disclaimer Will
- Maritalized Will
- Revocable Trust with Disclaimer
- Maritalized Revocable Trust
- Single Fund QTIP Marital Trust Incorporating the Delaware Tax Trap
- Disclaimer
- Irrevocable Life Insurance Trust
- Second-to-Die Irrevocable Life Insurance Trust
- Single Beneficiary Gift Trust
- Crummey Withdrawal Notice Letter

- Andrea S. Breckner
Olson & Breckner, P.A.; Minneapolis
- Robert E. Lynn
Bartley & Lynn; Northfield
- Michael P. Sampson
Maslon LLP; Minneapolis
- Edward H. Tully
Lathrop GPM; Minneapolis

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LIVE IN PERSON

February 21 & 27, 2024
Minnesota CLE Conference Center
600 Nicollet Mall, Suite 370
Third Floor City Center, Minneapolis

ONLINE REPLAYS

March 5 & 19, 2024
March 11 & 22, 2024
View online at www.minncle.org

A moderator will be available to answer questions by e-mail.

HOW TO REGISTER

Register online at www.minncle.org. Email customerservice@minncle.org or call 800-759-8840 for assistance.

COURSE MATERIALS

In-Person Attendees

Course materials will be provided to in-person attendees in hard copy. In-person attendees will also have electronic access to the course materials via their Minnesota CLE website accounts.

Online Replay Attendees

Online replay attendees will have electronic access to the course materials via their Minnesota CLE website accounts.

CREDITS

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

SCHOLARSHIPS AVAILABLE

Minnesota CLE maintains a scholarship program for those with a financial need. Contact Grant at 651-254-2103 or gdavies@minncle.org for further details or to obtain an application.

ACCOMMODATION

If you have a disability and need an accommodation in order to attend this seminar, contact Minnesota CLE as soon as possible at customerservice@minncle.org or 800-759-8840.

CANCELLATION / 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. Passholders may purchase the materials at 50% of the full retail price.

QUESTIONS?

customerservice@minncle.org
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Buy the **Drafting Wills and Trust Agreements Deskbook with eFormbook** for 25% off and have all of the forms at your fingertips.

Offer good through March 30, 2024