

**MONDAY & TUESDAY
JUNE 16 & 17, 2025**

The 2025
**Probate &
Trust Law**
Section Conference

**4 Prominent National
Authorities Join Forces
with a Talented
Minnesota Faculty**



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New York, New York



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School of Law
Kansas City, Missouri



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Beth Shapiro Kaufman
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**Don't Miss These Perennial
Conference Highlights!**

- 2025 Tax Law Update
- 2025 Non-Tax Case Law Update
- 2025 Legislative Update
- Satisfy All Your Special Credit Requirements
- 40+ Breakout Sessions in 10 Topical Tracks – Choose Those Most Relevant to Your Practice

*Join Your Friends and Colleagues at the
51st Annual Probate & Trust Law Section Conference!*

SPECIAL BONUS BENEFITS

View 5 Free Post-Conference Webcasts – Earn 5 Extra Credits!

The learning continues even when the Conference is over! Following the Conference, all attendees may view 5 live webcasts for free and receive 5 additional CLE credits – 3 ethics, 1 elimination of bias and 1 mental health/substance use. Instructions for how to register will be distributed at the Conference.

- 1 Elimination of Bias: Gender Identity Awareness and Considerations in Estate Planning**
Tuesday, July 22 | 12:00 – 1:00 p.m.
1.0 elimination of bias credit applied for
Mary Pat Byrn, Rachel M. Dahl, Yemaya Hanna & Alex Swanson
Amy M. Crea & Carly J. Johnson (moderators)
- 2 Ethics: Representing Clients with Diminished Capacity**
Tuesday, July 22 | 2:00 – 3:00 p.m.
1.0 ethics credit applied for
Aram V. Desteian
- 3 Ethics: 10 Things You Should Do Before Going on Vacation**
Wednesday, July 23 | 12:00 – 1:00 p.m.
1.0 ethics credit applied for
Susan M. Humiston & Courtney R. Sebo Savica
- 4 Mental Health and Substance Use in the Legal Profession and the Practice of Law**
Friday, July 25 | 12:00 – 1:00 p.m.
1.0 mental health/substance use credit applied for
Jon Tynjala
- 5 2025 Attorney Discipline Update: Lessons for Lawyers**
Thursday, July 31 | 12:00 – 1:00 p.m.
1.0 ethics credit applied for
Caitlin Guilford & Joanna Labastida

2 New Legal QuickSheets™:

- The Accounts and Assets that Shape Estate Planning**
Robyn Ingber
Diana L. Marianetti
- Taxes 101 for Estate Planners**
Jennifer R. Colich
Sonny F. Miller



Don't Miss Out! Register today at www.minncle.org

Can't attend in person? View the Limited Online Replay on July 17-18, 2025

The limited online replay includes all plenary sessions plus selected breakout sessions as indicated in the schedule.

DAY 1 – MONDAY, JUNE 16, 2025

All times are CDT

8:45 a.m. – 12:40 p.m.
MORNING PLENARY SESSIONS

8:00 – 8:45 a.m. CHECK-IN & CONTINENTAL BREAKFAST
Sponsored by Huntington Private Bank

8:45 – 9:00 a.m. WELCOME & ANNOUNCEMENTS
Kirstin E. Helmers

9:00 – 9:30 a.m.
The Road Ahead: Potential Shifts in Federal Estate Tax Policy in 2025
Beth Shapiro Kaufman



9:30 – 10:15 a.m.
2025 Non-Tax Case Law Update
An in-depth review of all Minnesota published and unpublished probate and trust cases and national published and unpublished probate and trust cases that provide relevant insight to our practice of law in Minnesota.
Andrew T. Howard & Robert A. McLeod

10:15 – 10:30 a.m. BREAK

10:30 – 11:00 a.m.
2025 Legislative Update
A fast-paced review of estate planning related developments in the 2025 legislative session.
Cameron R. Kelly & John A. Wehrly

11:00 – 11:45 a.m.
2025 SECURE Act Update – Final Regulations
Bryan Jamison

11:45 a.m. – 12:30 p.m.
2025 Tax Law Update
Three experts highlight recent developments in tax law of interest to all trust and estate lawyers.
Nicole M. Flaherty Cropper & Beth Shapiro Kaufman
Tessa R. Mielke (moderator)

12:30 – 12:40 p.m. SECTION MEETING & ANNOUNCEMENTS
Kirstin E. Helmers

12:40 – 1:30 p.m. CONFERENCE LUNCHEON
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LIMITED ONLINE REPLAY SESSIONS

In addition to all plenary sessions, the breakout sessions in these three designated tracks will be recorded for the Limited Online Replay on July 17-18, 2025.

TOTE BAGS – *Sponsored by Evercore Wealth Management and Trust Company*
LANYARDS – *Sponsored by Bremer Wealth*

1:30 – 2:30 p.m.
BREAKOUT A

101
Your First Client: Using the Initial Client Interview to Inform the Estate Plan
Letty M-S Van Ert

102
A Closer Look at the SECURE Act Final Regulations
Bryan Jamison

103
Solving Problems in Estate Planning
Caitlin E. Abram
Lauren G. Barron

104
How to Close an Estate and Distribute Assets
Alison J. Midden

105
Hot Topics in Trust and Estate Litigation in 2025
Kirstin E. Helmers
Denise S. Rahne

106
Beyond the Balance: How Different Types of Accounts and Assets Shape Estate Planning
Robyn Ingber
Diana L. Marianetti

2:30 – 2:45 p.m.
POPCORN BREAK
Sponsored by Security Bank & Trust Co.

2:45 – 3:45 p.m.
BREAKOUT B

201
Your First Will and Trust: Key Considerations When Drafting Your First Will and Trust
Omni N. Kiecker

202
Estate Planning for Minnesota's Middle-Rich Professionals
Rachel M. Dahl

203
Maximizing the Step-Up: Tax Basis Essentials and Planning Strategies
Jesse C. Beier
Cameron R. Kelly

204
2025 Title Examiners Panel: How to Handle Tricky Real Estate Recording Scenarios
Wayne D. Anderson
Jody L. McGinley
David J. Meyers
J. Steve Nys (moderator)

205
How to Handle Pre-Mortem Disputes
Berly D. Nelson
Evan A. Nelson

206
New Developments in Minnesota Guardianship Law, Including the Abolition of Statutory Immunity
Megan C. Kelly
Jeffrey Kittelson
Referee Joel Olson
Sarah B. Sicheneder (moderator)

207
Tax 101: What Every Planner Must Know About the Taxes Involved in Estate Planning
Jennifer R. Colich
Sonny F. Miller

3:45 – 4:00 p.m.
BREAK

4:00 – 5:00 p.m.
BREAKOUT C

301
Your First Health Care Directive and Power of Attorney
Melissa Hagstrum Bayne

302
Reading the Fine Print: Exempt Assets and Elective Share Explained
Elizabeth V. Cutter
Referee Lori D. Skibbie
Mai Y. Yang

303
Tax-Smart Charitable Giving, Especially with Retirement Assets
Christopher Hoyt



304
2025 Probate Panel: Reviewing and Resolving the Latest Issues in Probate Administration
Andrea S. Breckner
Laura E. Halferty
Tina M. Johnson
Lindy C. Scanlon
Daniel R. Donovan (moderator)

305
How to Avoid the Top 10 Litigation Traps for Estate Planners
Jessica L. Kometz
Casey D. Marshall

306
Using TODDs Effectively – With Special Attention to the New Minnesota Legislative Changes
Jennifer L. Carey

307
Medical Assistance for Estate Planners: How to Navigate the Gray Areas
Lauren L. Fink

5:00 p.m.
RECEPTION

Join your friends and colleagues for the Conference Reception
Sponsored by Wells Fargo Private Bank

7:30 a.m. CONTINENTAL BREAKFAST | 8:00 – 9:00 a.m. BREAKOUT D | 9:15 – 10:15 a.m. BREAKOUT E | 10:30 – 11:30 a.m. BREAKOUT F | 11:45 a.m. – 12:45 p.m. BREAKOUT G

FUNDAMENTALS	401 Your First Probate: How to Manage Important Timelines and Deadlines <i>Amy E. Erickson Amanda J. Kruse</i>	501 Your First Irrevocable Trust <i>Jayne E. Sykora</i>	601 New Lawyer Panel: Advice, Dos and Don'ts, Q and A and Resources <i>Spencer C. Butts Bethany J. Rubis Emily Valentine-Grimm Kimberly A. Prchal (moderator)</i>	
	402 ENCORE PRESENTATION Family Matters: Estate Planning Approaches for Blended Families <i>Courtney R. Sebo Savica</i>	502 2025 Medical Assistance Update <i>Amber M. Hildebrandt Julian J. Zweber</i>	602 The 2025 Small Estates Panel: How to Avoid Common Drafting Errors and Missed Opportunities <i>Amanda N. Juelson Jody Cohen Press Nicholas S. Stromsodt James T. McNary (moderator)</i>	701 1.0 elimination of bias credit applied for Elimination of Bias: Understanding Native American Cultures and Working with Native American Clients <i>Taylor L. Burdick Valerie S. Field</i>
LARGE ESTATES	403 Reality v. Theory: How to Conduct an Estate and Gift Tax Audit Based on What's Really Going on at the Service Level <i>Louis Harrison</i> 	503 Reimagining Succession Planning for Donor Advised Funds <i>Kristen Curatolo</i> 	603 2025 Large Estates Panel: The Election Is Over – What Do We Do Now? <i>Jennifer A. Ede Jennifer A. Lammers Lauren Winter Routhier Michael P. Sampson (moderator)</i>	702 Unpacking the Bundle of Sticks: Understanding Rights and Responsibilities in Life Estates <i>Matthew J. Frerichs Paul D. Funke</i>
	404 How to Navigate Valuation and Sale Issues with Agricultural Estates <i>Christopher M. Roe</i>	504 Estate Planning Strategies for the Middle-Rich Agricultural Estate <i>Kathryn J. Barnes</i>	604 How to Use SLATs in Agricultural Estate Planning <i>F. John Williams</i>	703 Resolving Common Title Issues in Farmland <i>Marty G. Helle</i>
TRUSTS	405 2025 Trust Officer Panel <i>John Kvamme Jay M. Olson Elizabeth A. Raleigh Sarah N. Sunday Kiley E. Petty Henry (moderator)</i>	505 Minnesota's New Law on Transferring Firearms <i>Ben I. Rust</i>	605 How to Wind Up a Trust in Minnesota <i>Kelli A. Hill Joshua C. Hillger</i>	704 ENCORE PRESENTATION What to Do with a Bad Personal Representative or Trustee <i>Brian A. Dillon John A. Wehrly Julian C. Zebot</i>
PRACTICE MANAGEMENT / TECHNOLOGY	406 AI Tools for Estate Planners: 4 I Recommend and 3 I Don't <i>Jess L. Birken</i>	506 How to Increase the Quality of Your Practice Life <i>Louis Harrison</i> 	606 Navigating Growth: How to Scale Your Estate Planning Firm with Confidence <i>Carrie A. Renner Philip J. Ruce Rachel T. Schromen Andy P. Gregory (moderator)</i>	
CURRENT ISSUES	407 Minnesota's New Law on Antenuptial Agreements: How It's Working in Practice <i>Michael P. Sampson James J. Vedder</i>	507 Minnesota's New Medical Debt Law: Implications for Estate Planners <i>Peter F. Barry Jill M. Sauber</i>	607 Psychology 101 for Lawyers: How to Work with Clients Experiencing Mental Health Issues <i>Karin K. Ciano Dr. Kirsten Lysne Denise S. Rahne Jennifer S. Santini (moderator)</i>	

9:00 – 9:15 a.m. BREAK | 10:15 – 10:30 a.m. BREAK | 11:30 – 11:45 a.m. BREAK

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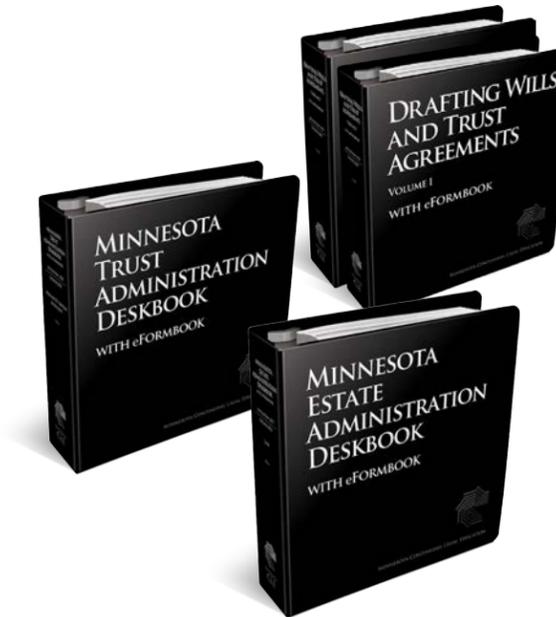
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Offer available only to attendees of the 2025 Probate & Trust Law Section Conference.

In-person attendees may take advantage of this offer by visiting the Minnesota CLE Publications Booth at the Conference on June 16-17, 2025.

Online replay attendees may place orders online at www.minncle.org on July 17-18, 2025 using a coupon code that will be provided at the replay.

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2025 Probate & Trust Law Section Conference

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- In-person access to all plenary sessions and your choice of breakout sessions
- Printed and electronic materials for all sessions
- Printed and electronic versions of the 2 new Legal QuickSheets™
- Breakfast, lunch and snacks at the Saint Paul RiverCentre
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- 1-year Watch Again access to plenary sessions and selected breakout sessions indicated in the schedule (for educational purposes only, not for additional CLE credit)
- 5 free live post-Conference webcasts

Limited Online Replay Viewers Receive:

- Online access to all plenary sessions and your choice of selected breakout sessions
- Electronic materials for all sessions
- Electronic versions of the 2 new Legal QuickSheets™
- 1-year Watch Again access to plenary sessions and selected breakout sessions indicated in the schedule (for educational purposes only, not for additional CLE credit)
- 5 free live post-Conference webcasts

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LIVE IN PERSON

Monday & Tuesday, June 16-17, 2025
Saint Paul RiverCentre
175 West Kellogg Boulevard
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LIMITED ONLINE REPLAY

Thursday & Friday, July 17-18, 2025
View online at www.minncle.org
Limited online replay includes all plenary sessions plus selected breakout sessions as indicated in the schedule. A moderator will be available to answer questions by email.

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Minnesota CLE has established room rates with the Saint Paul hotels listed below. Be sure to identify yourself with the Minnesota CLE 2025 Probate & Trust Law Conference to receive these rates. Make reservations early to ensure room/rate availability.

- **The Saint Paul Hotel**
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Reserve by: Sunday, May 18, 2025
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- **Hampton Inn Downtown St. Paul**
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Minnesota CLE is applying to the Minnesota State Board of CLE for **10.25 standard CLE credits, including 1.0 elimination of bias credit for session #701**. The maximum number of total CLE credits attendees may claim for the Conference is 10.25 credits, not including the post-conference webcasts.

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Monday & Tuesday, June 16-17, 2025
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