



LIVE IN PERSON

Thursday, January 30, 2025
Minnesota CLE Conference Center
600 Nicollet Mall, Suite 370
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Friday, February 14, 2025
View online at www.minncle.org
A moderator will be available to answer questions by e-mail.

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Minnesota CLE is applying to the Minnesota State Board of CLE for **6.0 CLE credits, including 1.0 ethics credit**. The maximum number of total credits attendees may claim is 6.0 credits.

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

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.

QUESTIONS?

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Minnesota Trust Administration Deskbook Seminar

Attend In Person
Thursday, January 30, 2025

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

Can't attend in person? View the online replay!

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TUITION:

\$295 MSBA member rate
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\$345 standard rate

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- **Super Passholders** may attend the in-person seminar or the online replay at no charge.
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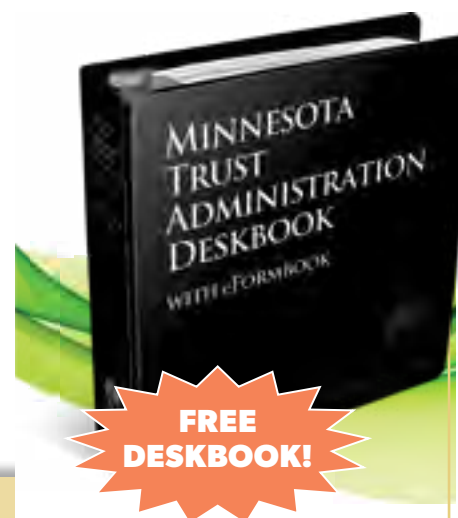
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View information on
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Minnesota Trust Administration Deskbook Seminar



FREE DESKBOOK!

Join us for a helpful full-day seminar focused on Trust Administration in Minnesota.

Our expert faculty will review the fundamentals of trust administration, from creation and modification to termination, as well as special topics like a trustee's duties and powers, removing a trustee, court jurisdiction and procedure, investment of trust assets and taxation of trusts, and much more! Additionally, there will be a 1-hour ethics session covering professional responsibility for trust attorneys.

NEW Fifth Edition! Deskbook includes accompanying eFormbook with over 85 forms!

- All in-person attendees will receive a hard copy of the *Minnesota Trust Administration Deskbook*.
- Online replay attendees will receive a 1-year subscription to the LinkedLaw version of the *Minnesota Trust Administration Deskbook*.

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Minnesota Trust Administration Deskbook Seminar

NEW FIFTH EDITION!
Free for all attendees!

Details inside.



COURSE MATERIALS

The materials for this course will be the NEW Fifth Edition of the *Minnesota Trust Administration Deskbook with eFormbook*. In-person attendees will receive a hard copy of the Deskbook, including the accompanying eFormbook. Online replay attendees will receive a 1-year subscription to the LinkedLaw version of the Deskbook, including eFormbook.

Online replay attendees may purchase the hard copy Deskbook for \$150. Contact Minnesota CLE customer service at 800-759-8840 to order.



THE SEMINAR

The Minnesota Trust Administration Deskbook Seminar will cover the basics of trust administration, from creation and modification to termination, and touch on special topics like trustee duties and powers, supplemental and special needs trusts, investment and taxation of trust assets, and court jurisdiction and procedure. In addition, all attendees will receive the NEW Fifth Edition of the *Minnesota Trust Administration Deskbook with eFormbook* as their materials for the course.

8:30 – 8:55 a.m.
CHECK-IN & CONTINENTAL BREAKFAST

8:55 – 9:00 a.m.
Introduction by Editors
– *Diana L. Marianetti*
NorthRock Partners; Minneapolis
– *Sarah N. Sunday*
Northern Trust; Minneapolis
– *Ivory S. Umanah*
Engelmeier & Umanah PA; Minneapolis

9:00 – 9:30 a.m.
Creation & Modification of Trusts
– *Michelle Rehbein*
Stinson LLP; Minneapolis

9:30 – 10:00 a.m.
Trustee Duties, Powers, Liabilities, and Termination
– *Christopher Burns*
Henson & Efron; Minneapolis

10:00 – 10:30 a.m.
Termination of Trusts
– *Kelli Hill*
Parr McKnight Wealth Management Group; Minneapolis
– *Marcia Urban*
BMO Wealth Management; Minneapolis

10:30 – 10:45 a.m.
BREAK

10:45 – 11:15 a.m.
Court Jurisdiction & Procedure
– *Nathaniel Ajouri*
Maslon LLP; Minneapolis

11:15 – 11:45 a.m.
Supplemental & Special Needs Trusts
– *Jeffrey Schmidt*
Schmitz, Schmidt & Anderson PA; Saint Paul

11:45 a.m. – 12:15 p.m.
Taxation of Trusts
– *John Bedosky*
Hinman, Howard & Kattell LLP; Binghampton, New York

12:15 – 1:15 p.m.
LUNCH BREAK (on your own)

1:15 – 1:45 p.m.
Investment of Trust Assets
– *Jason Schuller*
Fiduciary Counseling Inc.; Saint Paul

1:45 – 2:15 p.m.
Decanting
– *Beth Abraham*
Graber Law LLC; Minneapolis

2:15 – 2:45 p.m.
Directed Trusts
– *Jason Schuller*
Fiduciary Counseling Inc.; Saint Paul

2:45 – 3:00 p.m.
BREAK

3:00 – 3:30 p.m.
Real Estate Issues: The MN Corporate Farm Act
– *Brandon Edmundson*
Edman, Edmundson & Odgren, Ltd.; Fairmont

3:30 – 4:30 p.m.
Professional Responsibility
1.0 ethics credit applied for
– *Aram Desteian*
Bassford Remele; Minneapolis
– *Benjamin Formell*
Bassford Remele; Minneapolis

THE DESKBOOK

Minnesota Trust Administration Deskbook, 5th Edition
Decksbook Editors: Diana L. Marianetti, Sarah N. Sunday & Ivory S. Umanah

The NEW Fifth Edition of the *Minnesota Trust Administration Deskbook with eFormbook* has been fully updated and includes detailed coverage of the creation and modification of trusts, managing the day-to-day administration of trusts, handling the termination of trusts, and much more! The Deskbook puts focus on the creation, modification, and administration of trusts, as well as providing in-depth coverage to the topics our readers said are most important to their practice. The Deskbook also includes updated sample forms and clauses, helpful comparison charts, and a fully updated subject index and table of authorities. The *Minnesota Trust Administration Deskbook* includes an eFormbook, accessible via the Minnesota CLE website, which provides access to more than 85 trust forms. The forms are available in Word for Deskbook owners to download and save for future use.



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TRUST ADMINISTRATION DESKBOOK eFORMBOOK: LIST OF FORMS

Supplementary Materials and Sample Forms

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