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DATED MATERIAL – PLEASE EXPEDITE!



View information on
your mobile device or
register online.



COURSE INFORMATION

LIVE IN PERSON
Wednesday, February 19, 2025
Minnesota CLE Conference Center
600 Nicollet Mall, Suite 370
Third Floor City Center, Minneapolis

ONLINE REPLAY
Thursday, March 6, 2025
Tuesday, March 18, 2025
View online at www.minncle.org
A moderator will be available to answer questions by email.

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 will receive hard copies of all course materials submitted. All attendees will have access to all course materials via their Minnesota CLE online accounts.

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 customerservice@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 **800-759-8840** or 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 accounts.

QUESTIONS?
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800-759-8840



PLANNING & DRAFTING FOR THE SMALL ESTATE



Wednesday, February 19, 2025 – Attend In Person

MINNESOTA CONTINUING LEGAL EDUCATION
Your Success Is Our Goal

UPDATED FOR 2025!

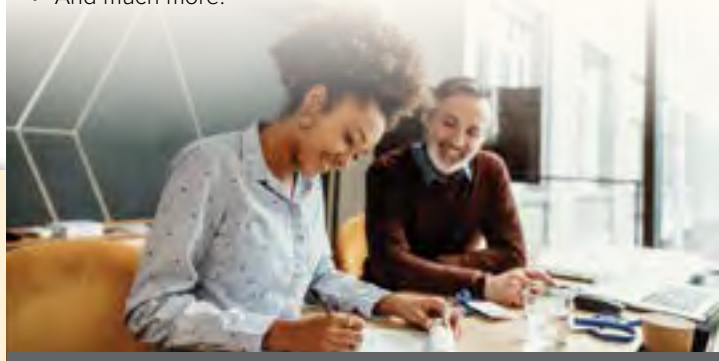
PLANNING & DRAFTING FOR THE SMALL ESTATE

It's Not So Small Anymore!

A practical seminar for solo and small firm attorneys who work with small estates.

HIGHLIGHTS INCLUDE:

- How to Conduct an **Effective Client Intake**
- What You Need to Know About **Beneficiary Designations**
- Understanding the Available **Powers of Attorney**
- 5 Key Points Regarding **Medical Assistance Eligibility**
- **Ways to Transfer Real Estate** as Part of an Overall Estate Planning Strategy
- Understanding **Advanced Directives for Health Care and End of Life**
- And much more!



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600 Nicollet Mall, Suite 370, Minneapolis

Can't Attend In Person?
View an Online Replay on Thursday, March 6, 2025 or Tuesday, March 18, 2025

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

9:00 – 9:05 a.m.
WELCOME & INTRODUCTION

9:05 – 9:50 a.m.

Building Rapport and Getting the Information You Need – How to Make the Most of the Initial Client Meeting

Learn the five topics you must address in your initial client meeting: dual/multipart representation; retainer agreements/engagement letters; probate assets vs. non-probate assets; wills vs. trusts; and incapacity planning.

– Jody A. Cohen Press

9:50 – 10:20 a.m.

How to Draft Beneficial Beneficiary Designations

This session will address the importance of reviewing and updating beneficiary designations. Discussions will include the Minnesota Multipart Accounts Act; Revocation of Beneficiary Designation by Marriage Dissolution (Minn. Stat. § 524.2-804 and *Sveen v. Melin*); and Rights of Survivorship (Minn. Stat. § 524.6-204 and *Estate of Patrick W. Butler*).

– Megan C. Kelly

10:20 – 10:50 a.m.

5 Things Every Estate Planning Attorney Needs to Know About Medical Assistance Eligibility

Learn five key points to know about Medical Assistance eligibility, including statutory references, applicable law and estate recovery.

– Martha Amdahl

10:50 – 11:00 a.m.
BREAK

11:00 – 11:30 a.m.

Integrating Long-Term Care Insurance Into a Small Estate Plan

With the rising costs of long-term care, it's crucial to advise clients on strategies that protect their assets while ensuring access to necessary care. Get guidance for effectively integrating long-term care insurance into small estate plans.

– Jody A. Cohen Press
Elizabeth I. Wrobel

11:30 a.m. – 12:00 p.m.

Distributions from Retirement Accounts and Other Tax Considerations for the Small Estate

Gain a practical understanding of the complex tax implications surrounding distributions from retirement accounts and the key tax considerations, planning opportunities, and potential pitfalls associated with distributions.

– James T. McNary

12:00 – 12:45 p.m.

LUNCH BREAK (on your own)

12:45 – 1:30 p.m.

Transfer on Death Deeds and Other Methods of Transferring Real Estate as Part of the Plan for a Small Estate

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 – 2:30 p.m.

Effective Will Drafting for the Small Estate

Get a comprehensive overview of Will formalities and legalities, including:

- Drafting testamentary trusts
- Choosing corporate vs. individual fiduciaries
- Considerations in drafting a pot trust vs. separate share trusts
- Planning for tangible personal property and digital assets
- Considerations in drafting a codicil vs. a new will
- Tips for drafting for minors and incapacitated beneficiaries

– Phillip J. Ruce

2:30 – 2:45 p.m.
BREAK

2:45 – 3:30 p.m.

Understanding Advanced Directives for Health Care and End of Life

Comparing and contrasting Health Care Directives, DNR/DNI forms, POLST's and the Caregiver Act, including the interplay in theory and practice between these documents. Also, practical tips on helping clients overcome barriers to completing their directives.

– Mary Frances M. Price

3:30 – 4:15 p.m.

Understanding the Available Powers of Attorney: “A-N” and Beyond

This session will explain the powers and limitations of Attorneys-in-Fact, the importance of selecting the right people for the job and remedies when things go wrong.

– John P. Worrell



SPECIAL OFFER:

SAVE 25% ON THE DRAFTING WILLS & TRUST AGREEMENTS DESKBOOK!

Offering vital information regarding any and every estate plan, the *Drafting Wills and Trusts Agreements Deskbook with eFormbook* is an invaluable tool and the best resource available on estate planning in Minnesota.

All attendees at this course will be able to purchase this *Deskbook* for 25% off, either in hard copy, or electronically through a subscription to the *LinkedLaw Deskbook PREMIUM Library*. Instructions on how to obtain the discount will be provided at the seminar. Offer good until 3/31/25.

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

PLANNING & DRAFTING FOR THE SMALL ESTATE

WEDNESDAY, FEBRUARY 19, 2025

Attend In Person

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

Can't attend the live seminar?

View an online replay Thursday, March 6, 2025 or Tuesday, March 18, 2025

www.minncle.org

5013-25 | abd | PAT/p

Register online at www.minncle.org

Email customerservice@minncle.org or call 800-759-8840 for assistance.

TUITION:

\$295 MSBA member

\$295 paralegal

\$345 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 who have been admitted to the bar fewer than 5 years receive a 50% discount.

SCHOLARSHIPS AVAILABLE

Minnesota CLE maintains a scholarship program for those individuals with a financial need. To obtain a scholarship application, contact customerservice@minncle.org.

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