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2025

DRAFTING WILLS & TRUST AGREEMENTS

FORMS SERIES

Attend In Person
Minnesota CLE Conference Center
600 Nicollet Mall, Suite 370, Minneapolis

Tuesday, February 18, 2025

Scenario-Based Estate Planning (For Non-Taxable Estates)	[5031-25]
Practice Pointers for Every Estate Plan	[5030-25]

Friday, February 21, 2025

A Deep Dive into SLATs: Another Tool for your Toolbox	[5028-25]
Estate Planning with Retirement Accounts	[5029-25]

Can't attend the live seminars?
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$155 MSBA member
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4 helpful half-day seminars focusing on forms in the Drafting Wills and Trust Agreements Deskbook

FEBRUARY 18 & 21, 2025

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DRAFTING WILLS & TRUST AGREEMENTS
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TUESDAY, FEBRUARY 18, 2025

1. **Scenario-Based Estate Planning (For Non-Taxable Estates)**
2. **Practice Pointers for Every Estate Plan**

FRIDAY, FEBRUARY 21, 2025

3. **A Deep Dive into SLATs: Another Tool for Your Toolbox**
4. **Estate Planning with Retirement Accounts**

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

1 Scenario-Based Estate Planning (For Non-Taxable Estates)

LIVE IN PERSON:
Tuesday, February 18, 2025 (Check-in: 8:30; Program 9:00)

ONLINE REPLAYS:
Wednesday, March 5, 2025 (Check-in: 8:30; Program 9:00)
Wednesday, March 19, 2025 (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 (For Non-Taxable Estates)

In this session, 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 DWTA forms into the discussion.

General topics include: Whether to Use Revocable Trusts or Wills; Trusts for Children: How to Structure, Things to Consider, Nominating Trustees; Independent Trustees; Handling Vacation Properties; Editing/Removing DWTA Paragraphs; Charities; Lapses; and Trustee Selection

NOTE: Panelists are willing to answer questions provided by attendees in advance of this session. By Monday, February 10, 2025, please email seminarquestions@minncle.org with specific questions or comments related to the DWTA forms for estate planning, and panelists will incorporate these questions into the presentation.

FORMS TO BE DISCUSSED*

- Basic Will
- Will with Trusts
- Disclaimer Will
- Revocable Trust with Disclaimer
- Joint Revocable Trust
- Amendments/Codicils
- Statutory Short Form Power of Attorney/Common Law Power of Attorney
- Irrevocable Life Insurance Trust
- Single Beneficiary Gift Trust ("Crummey")
- Nomination of Guardian
- Revocable Trust for a Single Person
- Revocable Trust for Retirement Plan Benefits

– *Jennifer S. Santini*
Sykora & Santini PLLC; Minneapolis
– *Paula J. Stumne*
Evercore Wealth Management and Evercore Trust Company NA; 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 Practice Pointers for Every Estate Plan

LIVE IN PERSON:
Tuesday, February 18, 2025 (Check-in: 12:30; Program 1:00)

ONLINE REPLAYS:
Wednesday, March 5, 2025 (Check-in: 12:30; Program 1:00)
Wednesday, March 19, 2025 (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)

Practice Pointers for Every Estate Plan

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 common challenges, best practices, answer questions, and offer pointers in connection with the more practical aspects of estate planning, from wills vs. trusts, joint trusts vs separate trusts, trust funding, and various forms used.

NOTE: Panelists are willing to answer questions provided by attendees in advance of this session. By Monday, February 10, 2025, please email seminarquestions@minncle.org with specific questions or comments surrounding estate planning issues described above. Panelists will incorporate these questions into the presentation.

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
- Basic Will
- Revocable Trust

– *Matthew J. Frerichs*
Maslon LLP; Minneapolis
– *Paul D. Funke*
Funke Law PLLC; Arden Hills
– *Jayne E. Sykora*
Sykora & Santini PLLC; Minneapolis

* **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.

3 A Deep Dive into SLATs: Another Tool for Your Toolbox

LIVE IN PERSON:
Friday, February 21, 2025 (Check-in: 8:30; Program 9:00)

ONLINE REPLAYS:
Tuesday, March 11, 2025 (Check-in: 8:30; Program 9:00)
Friday, March 28, 2025 (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)

A Deep Dive into SLATs: Another Tool for Your Toolbox

Spousal Lifetime Access Trusts (SLATs) have become a common estate tax planning strategy for married couples. In addition to covering the basics of SLATs including how they work and their key benefits and limitations, panelists will also walk through this new form and provide drafting tips so that you too can utilize this tool for your clients. Also learn what panelists will be doing for clients in 2025 before current federal legislation sunsets in 2026.

FORMS TO BE DISCUSSED*

- New SLAT Form

– *Andrea S. Breckner*
Olson & Breckner PA; Minneapolis
– *Michael P. Sampson*
Maslon LLP; Minneapolis
– *Edward H. Tully*
Lathrop GPM; Minneapolis

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4 Estate Planning with Retirement Accounts

LIVE IN PERSON:
Friday, February 21, 2025 (Check-in: 12:30; Program 1:00)

ONLINE REPLAYS:
Tuesday, March 11, 2025 (Check-in: 12:30; Program 1:00)
Friday, March 28, 2025 (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)

Estate Planning with Retirement Accounts

Retirement accounts are generally a (if not THE) major asset for most clients. Estate planning for retirement accounts requires consideration of both trust law issues and income tax issues. This session will discuss planning options and strategies using the DWTA forms considering the requirements of the SECURE Act and the other provisions of the Internal Revenue Code and the related Treasury Regulations. Additionally, panelists will share their experiences in practice with various real-life examples of how these planning options and strategies have played out when administering an estate.

NOTE: Panelists are willing to answer questions provided by attendees in advance of this session. By Monday, February 17, 2025, please email seminarquestions@minncle.org with specific questions or comments surrounding estate planning with retirement accounts. Panelists will incorporate these questions into the presentation.

FORMS TO BE DISCUSSED*

- Beneficiary Designations
- Maritalized Wills/Trusts
- Wills with Contingent Trusts

– *Robert E. Lynn*
Bartley & Lynn; Northfield
– *Alison J. Midden*
Taft Stettinius & Hollister LLP; Minneapolis
– *J. Steve Nys*
Fryberger, Buchanan, Smith & Frederick, P.A.; Duluth

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COURSE INFORMATION

LIVE IN PERSON
February 18 & 21, 2025
Minnesota CLE Conference Center
600 Nicollet Mall, Suite 370
Third Floor City Center, Minneapolis

ONLINE REPLAYS
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March 11 & 28, 2025
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QUESTIONS?
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