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Smart Retirement Strategies for Lawyers

WEDNESDAY, OCTOBER 22, 2025 –

Attend In Person

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

Can't attend the live seminar?

View the online replay Thursday, November 6, 2025 or Friday, November 21, 2025

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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 less 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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DATED MATERIAL – PLEASE EXPEDITE!



Smart Retirement Strategies for Lawyers

**Wednesday, October 22, 2025
Attend In Person**



MINNESOTA CONTINUING LEGAL EDUCATION
Your Success Is Our Goal

Smart Retirement Strategies for Lawyers

How to Plan Your Ideal Retirement

It's never too early or too late to start planning your retirement!
Attend this seminar for expert advice on making or updating your retirement plans.

TOPICS INCLUDE:

- How to Afford Your Ideal Retirement: 10 Things to Consider When Creating a Financial Plan
- Should I Sell My Solo or Small Firm Practice? Everything You Need to Know
- Estate Planning Essentials: 4 Documents All Retiring Lawyers Must Have
- Avoiding Ethics Violations as You Close Your Practice
- Retiring Well: Interesting, Meaningful and Fun Things You Can Do in Retirement
- And More!

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or register online.



SCHEDULE

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

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

9:05 – 9:35 a.m.
**Now That You're Retired—
What's Next?**

What are the best ways to begin the next chapter? Roy Ginsburg shares his insights, along with advice on creating your own successful personal retirement plan.
– *Roy S. Ginsburg*

9:35 – 10:35 a.m.
**How to Afford Your Ideal
Retirement: 10 Things to
Consider When Creating a
Financial Plan**

Wealth managers Daniel Bongiovanni, Danielle Niska and Ria Olson will discuss:

- The importance of quantifying and prioritizing your goals, and new risks that you will face in retirement
 - Aligning your various income sources to your planned expenses and how to handle gaps
 - What Medicare does and does not cover and how to prepare for healthcare costs
 - Helpful planning tools and strategies for creating a customized plan
 - Major pitfalls and common mistakes to avoid
- *Daniel Bongiovanni*
– *Danielle M. Niska*
– *Ria G. Olson*

10:35 – 10:45 a.m.
BREAK

10:45 – 11:45 a.m.
**Should I Sell My Solo or Small
Firm Practice? Everything You
Need to Know**

Which practice areas have value and which don't? How to best structure deals? Who are the best buyers, and how do you find them? Roy Ginsburg answers these questions and more.
– *Roy S. Ginsburg*

11:45 a.m. – 12:30 p.m.
**Estate Planning Essentials:
4 Documents All Retiring
Lawyers Must Have**

Retirement planning is the perfect time to create or update your estate plan. Experienced estate planner Beth T. Morrison explains the 4 documents all lawyers should prepare to ensure that their affairs are handled according to their wishes should they die or become incapable of making decisions.
– *Beth T. Morrison*

12:30 – 1:00 p.m.
LUNCH (on your own)

1:00 – 2:00 p.m.
**Don't Let the Door Hit You on
the Way Out: Avoiding Ethics
Violations as You Close Your
Practice**

1.0 ethics credit applied for
As retirement draws near, a little planning regarding handling old files, notifying clients of your retirement, and managing your trust account goes a long way toward a smooth transition. Plus, a primer for snowbirds on the limitations of practicing from other states.
– *Eric T. Cooperstein*

2:00 – 3:00 p.m.
**Retiring Well: Interesting,
Meaningful and Fun Things You
Can Do in Retirement**

Retired lawyers have a wealth of options for how to spend their time from volunteering locally to working part-time to traveling the world. Hear from a panel of retired lawyers who are thriving in retirement. You'll be inspired by their experiences to start planning your own ideal retirement.
– *Ellen A. Abbott*
– *Mickey S. Greenberg*
– *Robert R. Reinhart*
– *Moderator: Roy S. Ginsburg*

3:00 – 3:15 p.m.
BREAK

3:15 – 3:45 p.m.
**Purpose and a Paycheck:
Finding Meaning, Money, and
Happiness in the Second Half of
Life**

A presentation of retirement trends and challenges for baby boomers by Minnesota Public Radio's Chris Farrell.
– *Chris Farrell*

3:45 – 4:05 p.m.
**Strategies for Retiring from a
Large Firm**

A fireside chat addressing:

- How of counsel arrangements are set up
- How clients are transitioned to other lawyers in the firm
- Compensation issues
- How leadership roles are transitioned to other lawyers in the firm
- And more!

– *Roy S. Ginsburg*
– *Justin Weinberg*

FACULTY

Roy S. Ginsburg
Course Chair
Minneapolis

Ellen A. Abbott
Retired Lawyer
Minneapolis

Daniel Bongiovanni
Merrill Lynch Wealth
Management
Bloomington

Eric T. Cooperstein
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Minnesota Public Radio
Saint Paul

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Management
Bloomington

Robert R. Reinhart
Reinhart Mediation, LLC
Roseville

Justin Weinberg
Taft, Stettinius & Hollister LLP
Minneapolis

COURSE INFORMATION

LIVE IN PERSON
Wednesday, October 22, 2025
Minnesota CLE Conference Center
600 Nicollet Mall, Suite 370
Third Floor City Center, Minneapolis

ONLINE REPLAY
Thursday, November 6, 2025
Friday, November 21, 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 any 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 CLE credits, including 1.0 ethics credit**. 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 account.

QUESTIONS?
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