

**JUNE 8 & 9, 2026**

**SAINT PAUL RIVERCENTRE**

The 2026

# Probate & Trust Law

Section Conference

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## Don't Miss These Perennial Conference Highlights!

- 2026 Tax Law Update
- 2026 Non-Tax Case Law Update
- 2026 Legislative Update
- Satisfy All Your Special Credit Requirements
- 50+ Breakout Sessions in 10 Topical Tracks – Choose Those Most Relevant to Your Practice

*Take a Break from Your Office  
for 2 Days of Immersive Learning,  
Community and Fun!*

# SPECIAL BONUS BENEFITS

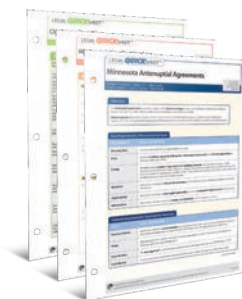
## View 4 Free Post-Conference Webcasts – Earn 4 Extra Credits!

The learning continues even when the Conference is over! Following the Conference, all attendees may view 4 live webcasts for free and receive 4 additional CLE credits – 1 ethics, 2 elimination of bias and 1 mental health/substance use. Instructions for how to register will be distributed at the Conference.

- 1 Your New Associate Doesn't Sleep – But It Hallucinates: AI and Legal Ethics**  
 Thursday, July 23 | 9:00 – 10:00 a.m.  
 1.0 ethics credit applied for  
*Christopher D. Luehr*
- 2 Perfecting Without Perfectionism: How to Strive for Excellence Without Stressing Out Over Unattainable Ideals**  
 Thursday, August 6 | 9:00 – 10:00 a.m.  
 1.0 mental health / substance use credit applied for  
*Sarah M. MacGillis*
- 3 Elimination of Bias: The Black Lawyer in Minnesota 1973 to 2023 – A Story of Firsts and Those Who Made a Difference**  
 Thursday, August 6 | 12:00 – 1:00 p.m.  
 1.0 elimination of bias credit applied for  
*Jeffrey A. Hassan*
- 4 Elimination of Bias: Drafting and Planning for Muslim Clients**  
 Friday, August 7 | 9:00 – 10:00 a.m.  
 1.0 elimination of bias credit applied for  
*Imani S. Jaafar*

## 3 New Legal QuickSheets™:

- Antenuptial Agreements**  
*Michael P. Sampson*  
*James J. Vedder*
- Trust Situs**  
*Sarah F. Armstrong*
- Partition Law**  
*B. Steven Messick*



## Don't Miss Out! Register today at [www.minncle.org](http://www.minncle.org)

Can't attend in person? View the Limited Online Replay on July 20-21, 2026

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

# DAY 1 – MONDAY, JUNE 8, 2026

All times are CDT

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

1:30 – 2:30 p.m.  
BREAKOUT A

2:45 – 3:45 p.m.  
BREAKOUT B

4:00 – 5:00 p.m.  
BREAKOUT C

8:00 – 8:45 a.m. CHECK-IN & CONTINENTAL BREAKFAST  
*Sponsored by Saint Paul & Minnesota Foundation*

8:45 – 9:00 a.m. WELCOME & ANNOUNCEMENTS  
*Joel A. Sommers*

9:00 – 9:40 a.m.  
**2026 Non-Tax Case Law Update**  
An in-depth review of all Minnesota 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*

9:40 – 10:10 a.m.  
**2026 Legislative Update**  
A fast-paced review of estate planning related developments in the 2026 legislative session.  
*Cameron R. Kelly & John A. Wehrly*

10:10 – 10:50 a.m.  
**Should Contesting Cost Everything? The Chafoulias Case and No-Contest Clauses**  
*Cameron R. Kelly & Evan A. Nelson*

10:50 – 11:10 a.m. BREAK

11:10 – 11:50 a.m.  
**2026 Tax Law Update**  
Three experts highlight recent developments in tax law of interest to all trust and estate lawyers.  
*Keri D. Brown & Steven B. Gorin*  
*Tessa R. Mielke (moderator)*

11:50 a.m. – 12:30 p.m.  
**Planning with Life Insurance LLCs after Connelly and Huffman**  
*Steven B. Gorin*

12:30 – 12:40 p.m. SECTION MEETING & ANNOUNCEMENTS  
*Joel A. Sommers*

12:40 – 1:30 p.m. CONFERENCE LUNCHEON  
*Sponsored by Capital First Trust Company*

**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 20-21, 2026.

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

	FUNDAMENTALS	PLANNING	LARGE ESTATES	ESTATE ADMINISTRATION	LITIGATION / ADR	NEW LAW	PRACTICE MANAGEMENT / TECHNOLOGY
	101 <b>Your First Client: Using the Initial Client Interview to Inform the Estate Plan</b> <i>Letty M-S Van Ert</i>	102 <b>A Deep Dive into the SECURE Act and Final Regulations</b> <i>Bryan Jamison</i>	103 <b>Current Developments in Estate and Gift Tax Audits and Litigation</b> <i>Keri D. Brown</i>	104 <b>How to Work Through Minnesota's Slayer Statute</b> <i>Andrew M. Baese &amp; Thomas H. Rauenhurst</i>	105 <b>Recognizing the Literary Archetypes of Family Wealth Disputes and Practical Tips for Managing Them</b> <i>Spencer C. Butts &amp; Denise S. Rahne</i>	106 <b>The New Financial Exploitation Injunction Law: A New Tool to Protect Vulnerable Adults</b> <i>Mary McGurran, Nicholas B. Wanka &amp; Referee Elizabeth Wendt</i> <i>Jill M. Sauber (moderator)</i>	107 <b>How to Effectively Use AI in Your Law Practice</b> <i>Daniel A. Tysver</i>
	201 <b>Your First Will and Trust: Key Considerations When Drafting Your First Will and Trust</b> <i>Omni N. Kiecker</i>	202 <b>1.0 ethics credit applied for</b> <b>Speak at Your Own Risk: Attorney-Client Privilege Issues for Estate and Probate Lawyers</b> <i>Eric T. Cooperstein</i>	203 <b>Strategic Wealth Transfer: Balancing Income Tax Planning and Estate Tax Planning</b> <i>Charles A. "Clary" Redd</i>	204 <b>Probating the Difficult Estate: Identifying and Managing Problem Assets</b> <i>Joshua C. Hillger &amp; Barbara M. Kristiansson</i>	205 <b>How to Handle a Contested Probate Case Step-by-Step from Start to Finish</b> <i>Bethany J. Rubis &amp; Patricia J. Stotzheim</i>	206 <b>Minnesota's New Partition Law, the New FinCEN Regulations, and Other Real Estate Tips</b> <i>B. Steven Messick</i>	207 <b>Where Are We on Electronic Wills, Other Electronic Estate Planning Documents, Harmless Error and Remote Notarization?</b> <i>Cameron R. Kelly &amp; John A. Wehrly</i>
	301 <b>Your First Health Care Directive and Power of Attorney</b> <i>Chad A. Carr</i>	302 <b>The 2026 Small Estates Panel: How to Analyze Common (and Uncommon) Planning Scenarios</b> <i>Amanda N. Juelson, Melissa Taylor &amp; Susan L. Waldie</i> <i>James T. McNary (moderator)</i>	303 <b>1.0 ethics credit applied for</b> <b>SLATs – Third Wheel (or Third Rail!) of Planning for Married and Divorcing Couples: Ethical, Practical, and Tax Considerations</b> <i>James I. Dougherty &amp; Stephanie Loomis-Price</i>	304 <b>2026 Probate Panel: Reviewing and Resolving the Latest Issues in Probate Administration</b> <i>Yvette Andrade, Laura E. Halferty, Tina M. Johnson &amp; Jennifer S. Santini</i> <i>Daniel R. Donovan (moderator)</i>	305 <b>Preserving Your Record for Appeal: Burdens of Proof, Developing the Record, and Appellate Review in Trust and Estate Litigation</b> <i>Amy E. Erickson &amp; Richard C. Landon</i>	306 <b>Minnesota's Modern Rule Against Perpetuities: What Changed and Why It Matters</b> <i>Jesse C. Beier</i>	307 <b>What's Working (and Not Working) in Your Practice: A Roundtable Discussion</b> <i>Callyn T. Bedker &amp; Heather M. Gilbert</i>

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

3:45 – 4:00 p.m.  
SNACK BREAK  
*Sponsored by Management Planning Inc.*

5:00 p.m.  
RECEPTION  
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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**  
*Amy M. Crea, Emily Ditzler & Amanda J. Kruse*

501  
**Preparing Estate Plans: A Balancing Act Between Avoiding Probate and Avoiding MA Recovery Claims**  
*Jill M. Sauber*

601  
**New Lawyer Panel: Advice, Dos and Don'ts, Q and A and Resources**  
*Nicole A. Raebel, Emily Valentine-Grimm & Mai Yang  
Kimberly A. Prchal (moderator)*

PLANNING

402  
**Assessing Testamentary Capacity: Legal Standards Versus Clinical Realities**  
*Courtney R. Sebo Savica & Dr. Rodolfo Savica*

502  
**2026 Medical Assistance Update**  
*Amber M. Hildebrandt & Christopher J. Kradle*

602  
**Two States, One Marriage: Entrance and Exit Planning When Moving Between Separate Property and Community Property States**  
*Alison J. Midden*

701  
**Open Forum on the SECURE Act and More – Your Questions, Answered!**  
*Bryan Jamison*

LARGE ESTATES

403  
**Charitable Gift Planning in Practice: How Estate Planners and Charities Work Together**  
*Kassandra K. Heinrich-Wydra, Mark Hintz, Luther Ranheim & Kyle Wesely  
Jayne E. Sykora (moderator)*

503  
**2026 Large Estates Panel**  
*Jennifer A. Ede, Jennifer A. Lammers & Lauren Winter Routhier  
Michael P. Sampson (moderator)*

603  
**Hot Topics in International Estate Planning in 2026**  
*David Kula & Sonny F. Miller*

702  
**Buy-Sell Agreements and Succession Planning**  
*Lauren Winter Routhier & Justin J. Seitz*

TRUSTS

404  
**2026 Trust Officer Panel**  
*John Kvamme, Jay M. Olson, Trey Roberts & Ivory L. Ruud  
Kiley E. Petty Henry (moderator)*

504  
**Location, Location, Location: The Importance of Choosing a Trust Situs**  
*Sarah F. Armstrong*

604  
**Main Character Energy: Tax-Saving Power Moves with CRTs and CLTs in the 2026 Era**  
*Andy P. Gregory & Thomas H. Rauenhorst*

703  
**Trust / Fiduciary Accounting Versus Tax Accounting: A Practical Guide to 1041s for Trustees and Advisors**  
*Phillip J. Ruce*

AGRICULTURAL ESTATES

405  
**Medical Assistance Issues for Farmers**  
*James T. McNary & Traci J. Sherman*

505  
**Hot Topics in Agricultural Estate Planning: Opportunity Zones, CRTs and More**  
*Paul Neiffer*

605  
**Keeping the Farm in the Family: Succession Strategies for Farming and Non-Farming Heirs**  
*Christopher M. Roe*

704  
**Practicing in Greater Minnesota: Exploring the Opportunities and Challenges**  
*Heather M. Gilbert, Jennifer L.J. Gilk, Marty G. Helle & Amber M. Hildebrandt  
Brandon J. Edmundson (moderator)*

GENERAL INTEREST

406  
**Behind the Curtain of Probate Real Estate: Valuation Insight, Contract Wisdom, and Better Decisions**  
*Jordan M. Carew, Dave Dettmann & Eric Eickhof*

506  
**Real Estate Mistakes Made by Estate Planning and Probate Attorneys**  
*Marty G. Helle*

606  
**Power of Attorney and Parental Delegation for Immigrants in Our Community**  
*Christine B. Courtney & Miluska L. Novota*

705  
**Behind the Scenes: How Financial Institutions Implement Estate Plans**  
*Shannon E. Berg, Robyn Ingber, Nicole Scanlon & Andrew Theis  
Andrew J. Peterson (moderator)*



407  
**Wills v. Revocable Trusts – Part 1: Walk Through a Maritalized Family Trust Will**  
*Matthew J. Frerichs & Edward H. Tully*

507  
**Wills v. Revocable Trusts – Part 2: Miscellaneous Clauses, Including Beneficiary Designations and Miscellaneous Documents**  
*Andrea S. Breckner & Paul D. Funke*

607  
**How to Draft Cabin Trusts**  
*Matthew J. Frerichs & Ruthanne Hedstrom Vos*

706  
**Open Forum on Drafting Wills & Trust Agreements: Your Questions Answered!**  
*Andrea S. Breckner, Michael P. Sampson & Jayne E. Sykora*

9:00 – 9:15 a.m.  
BREAK

10:15 – 10:30 a.m.  
BREAK

11:30 – 11:45 a.m.  
SNACK BREAK  
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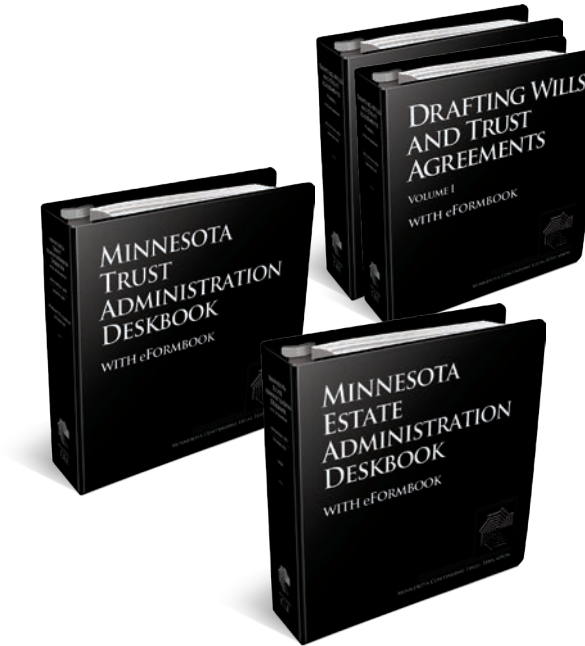
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Offer available only to attendees of the 2026 Probate & Trust Law Section Conference.

**In-person attendees** may take advantage of this offer by visiting the Minnesota CLE Publications Booth at the Conference on June 8-9, 2026.

**Online replay attendees** may place orders online at [www.minncle.org](http://www.minncle.org) on July 20-21, 2026 using a coupon code that will be provided at the replay.

## SUMMARY OF BENEFITS

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- In-person access to all plenary sessions and your choice of breakout sessions
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- Breakfast, lunch and snacks at the Saint Paul RiverCentre
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- Online access to all plenary sessions and your choice of selected breakout sessions
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- Electronic versions of the 3 new Legal QuickSheets™
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- 4 free live post-Conference webcasts

Plan now to take part in the  
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# COURSE INFORMATION

## LIVE IN PERSON

**Monday & Tuesday, June 8-9, 2026**  
**Saint Paul RiverCentre**  
175 West Kellogg Boulevard  
Saint Paul, Minnesota

## LIMITED ONLINE REPLAY

**Monday & Tuesday, July 20-21, 2026**  
**View online at [www.minncle.org](http://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.

## HOTEL ACCOMMODATIONS

Minnesota CLE has established room rates with the Saint Paul hotels listed below. Be sure to identify yourself with the Minnesota CLE 2026 Probate & Trust Law Conference to receive these rates. Make reservations early to ensure room/rate availability.

- **The Saint Paul Hotel**  
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Saint Paul, MN 55102  
651-292-9292  
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- **Holiday Inn St. Paul Downtown**  
**\$115 (plus tax)**  
175 Seventh Street West  
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651-225-1515  
Reserve by: Friday, May 8, 2026
- **Hampton Inn Downtown St. Paul**  
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200 Seventh Street West  
Saint Paul, MN 55102  
651-224-7400  
Reserve by: Saturday, May 16, 2026

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5179-26 | tmm | sbg | PAtlp

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