

JUNE 8 & 9, 2026

SAINT PAUL RIVERCENTRE

The 2026

Probate & Trust Law

Section Conference

**6 Leading National Experts
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Minnesota Faculty**



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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

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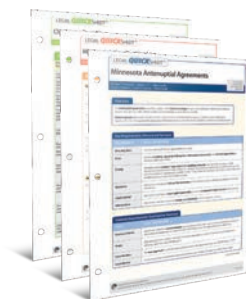
View 4 Free Post-Conference Webcasts – Earn 4 Extra Credits!

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

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

101
Your First Client: Using the Initial Client Interview to Inform the Estate Plan
Letty M-S Van Ert

201
Your First Will and Trust: Key Considerations When Drafting Your First Will and Trust
Omni N. Kiecker

301
Your First Health Care Directive and Power of Attorney
Chad A. Carr

PLANNING

102
A Deep Dive into the SECURE Act and Final Regulations
Bryan Jamison

202 **1.0 ethics credit applied for**
Speak at Your Own Risk: Attorney-Client Privilege Issues for Estate and Probate Lawyers
Eric T. Cooperstein

302
The 2026 Small Estates Panel: How to Analyze Common (and Uncommon) Planning Scenarios
Amanda N. Juelson, Melissa Taylor & Susan L. Waldie
James T. McNary (moderator)

LARGE ESTATES

103
Current Developments in Estate and Gift Tax Audits and Litigation
Keri D. Brown

203
Strategic Wealth Transfer: Balancing Income Tax Planning and Estate Tax Planning
Charles A. "Clary" Redd

303 **1.0 ethics credit applied for**
SLATs – Third Wheel (or Third Rail!) of Planning for Married and Divorcing Couples: Ethical, Practical, and Tax Considerations
James I. Dougherty & Stephanie Loomis-Price

ESTATE ADMINISTRATION

104
How to Work Through Minnesota's Slayer Statute
Andrew M. Baese & Thomas H. Rauenhurst

204
Probating the Difficult Estate: Identifying and Managing Problem Assets
Joshua C. Hillger & Barbara M. Kristiansson

304
2026 Probate Panel: Reviewing and Resolving the Latest Issues in Probate Administration
Yvette Andrade, Laura E. Halferty, Tina M. Johnson & Jennifer S. Santini
Daniel R. Donovan (moderator)

LITIGATION / ADR

105
Recognizing the Literary Archetypes of Family Wealth Disputes and Practical Tips for Managing Them
Spencer C. Butts & Denise S. Rahne

205
How to Handle a Contested Probate Case Step-by-Step from Start to Finish
Bethany J. Rubis & Patricia J. Stotzheim

305
Preserving Your Record for Appeal: Burdens of Proof, Developing the Record, and Appellate Review in Trust and Estate Litigation
Amy E. Erickson & Richard C. Landon

NEW LAW

106
The New Financial Exploitation Injunction Law: A New Tool to Protect Vulnerable Adults
Mary McGurran & Nicholas B. Wanka
Jill M. Sauber (moderator)

206
Minnesota's New Partition Law, the New FinCEN Regulations, and Other Real Estate Tips
B. Steven Messick

306
Minnesota's Modern Rule Against Perpetuities: What Changed and Why It Matters
Jesse C. Beier

PRACTICE MANAGEMENT / TECHNOLOGY

107
How to Effectively Use AI in Your Law Practice
Daniel A. Tysver

207
Where Are We on Electronic Wills, Other Electronic Estate Planning Documents, Harmless Error and Remote Notarization?
Cameron R. Kelly & John A. Wehrly

307
What's Working (and Not Working) in Your Practice: A Roundtable Discussion
Callyn T. Bedker & Heather M. Gilbert

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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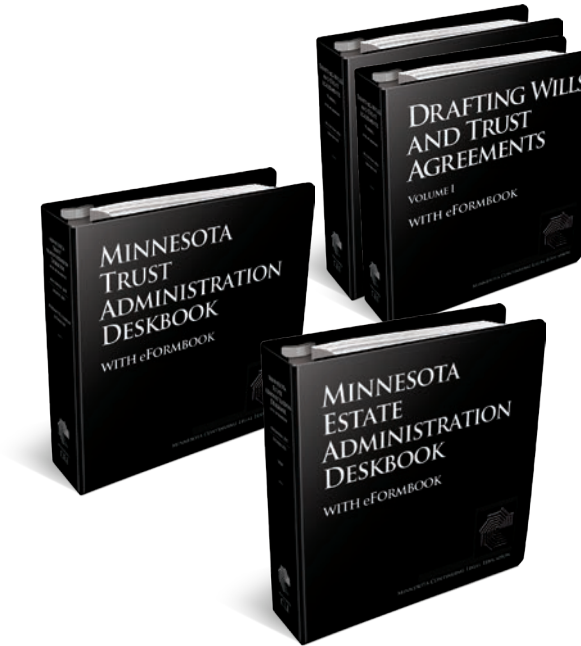
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- **Minnesota Trust Administration Deskbook with eFormbook**
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Online replay attendees may place orders online at www.minncle.org on July 20-21, 2026 using a coupon code that will be provided at the replay.

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- Online access to all plenary sessions and your choice of selected breakout sessions
- Electronic materials for all sessions
- Electronic versions of the 3 new Legal QuickSheets™
- 1-year Watch Again access to plenary sessions and selected breakout sessions indicated in the schedule (for educational purposes only, not for additional CLE credit)
- 4 free live post-Conference webcasts

Plan now to take part in the
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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

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.

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Monday & Tuesday, June 8-9, 2026
Saint Paul RiverCentre

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