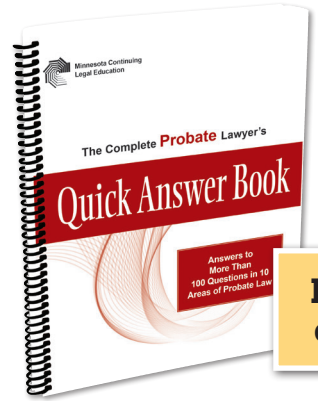


# The Complete Probate Lawyer's Quick Answer Book



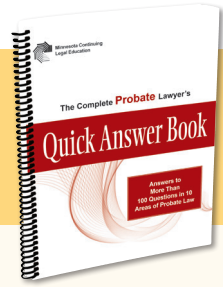
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# The Complete Probate Lawyer



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**Fast-paced and focused**

sessions designed for attorneys who have built their practice around probate law. Expand your probate law foundation or refresh your expertise in the areas that matter most to your practice.

**NEW and FREE for All Attendees – The Complete Probate Lawyer's Quick Answer Book.** A must-have reference guide containing the answers, legal authority, commentary and practice tips for all of the questions discussed in the course.

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Minnesota CLE Conference Center  
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## Faculty

**Andrew P. Gregory**  
Course Chair  
Andy Gregory Law, PLLC  
Eden Prairie

**Andrew J. Peterson**  
Larkin Hoffman Daly & Lindgren Ltd.  
Minneapolis

**John J. (Jack) Austin**  
Chandler and Brown, Ltd.  
Saint Paul

**Bethany Rubis**  
Messick Law PLLC  
Saint Paul

**Christine B. Courtney**  
Courtney Law Office, PLLC  
Saint Paul

**Gregory L. Singleton**  
Signature Law, PLLC  
Plymouth

**Camry M. Fielders**  
Northern Lakes Law, PLLC  
Saint Louis Park

**Lucas B. Spaeth**  
Thiel, Anderson, Kukla & Gunderson, P.L.L.P.  
Edina

**Benjamin J. Francis**  
Safe Harbor Estate Law  
Saint Paul

**Mai Y. Yang**  
MY Minnesota Estate Attorney, PLLC  
Roseville

**Heather M. Gilbert**  
Gilbert Law PLLC  
White Bear Lake

**Kelly J. Zech**  
Winthrop & Weinstine, P.A.  
Minneapolis

**Leina D. Holte**  
Northern Lakes Law, PLLC  
Saint Louis Park

**Christopher J. Kradle**  
Kradle Law PLLC  
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# The Complete Probate Lawyer

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**THURSDAY, MAY 28, 2026  
ATTEND IN PERSON**

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

10:40 – 10:55 a.m.  
BREAK

1:35 – 2:10 p.m.  
**Closing and Distribution**

- What does it mean to “close” an estate and when must an estate be closed?
  - How are debts and taxes handled?
  - What happens if new assets are found after the probate is closed?
  - And more
- *Mai Y. Yang*

10:55 – 11:30 a.m.  
**Real Estate**

- What practical steps should be taken to preserve the value of real property after the owner dies?
  - What documents need to be recorded to sell real property in a probate?
  - Can the personal representative of an estate use a standard purchase agreement to sell real property from a probate?
  - And more
- *John J. (Jack) Austin*  
– *Lucas B. Spaeth*

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

9:05 – 9:40 a.m.  
**Getting Started**

- What is probate and when is it required under Minnesota law?
  - What needs to happen in the first week/month following a death?
  - What documents need to be collected throughout the probate process?
  - And more
- *Camry M. Fielders*  
– *Leina D. Holte*

11:30 a.m. – 12:05 p.m.  
**Taxation Issues**

- What tax returns may need to be filed after someone dies?
  - How are beneficiaries taxed on distributions they receive from an estate during administration?
  - What basis adjustments occur at death, and why do they matter during administration?
  - And more
- *Andrew J. Peterson*

9:40 – 10:15 a.m.  
**Statutory Framework and the Initial Client Interview**

- What statutes govern probate and other types of estate administration in Minnesota?
  - How are jurisdiction and venue determined?
  - How do you determine whether to do a formal or informal probate?
  - And more
- *Christopher J. Kradle*

2:10 – 2:45 p.m.  
**Creditors’ Claims**

- What is the creditor claims period, and what can you do before it lapses?
  - What does and does not constitute notice or presentation of a claim?
  - How do you handle debts that the decedent held jointly with another?
  - And more
- *Benjamin J. Francis*  
– *Heather M. Gilbert*

12:05 – 1:00 p.m.  
LUNCH BREAK (on your own)

2:45 – 3:00 p.m.  
BREAK

3:00 – 3:35 p.m.  
**Professional Responsibility**  
*0.5 ethics credit (applied for)*

- If I prepared the estate plan for the decedent, can I represent the Personal Representative?
  - How can I bill for services in probate?
  - Can my client, the personal representative, distribute the assets in a way that does not concur with the distribution plan in the will if everyone agrees?
  - And more
- *Andrew P. Gregory*  
– *Gregory L. Singleton*

1:00 – 1:35 p.m.  
**Estate Litigation**

- What are the most common reasons a probate becomes contested?
  - How long does a party have to contest a will?
  - How do you prove fraud, duress, or mistake?
  - And more
- *Bethany Rubis*

10:15 – 10:40 a.m.  
**Miscellaneous Procedures**

- What is an Affidavit of Collection, and when should it be used?
  - What do you do if there are more assets in a “closed probate”, and how do subsequent administrations work?
  - How do you convey real estate in miscellaneous proceedings?
  - And more
- *Christine B. Courtney*

3:35 – 4:10 p.m.  
**Ancillary Administration**

- When is ancillary administration for a nonresident decedent required?
  - Who has priority to serve as personal representative in an ancillary administration?
  - How are assets distributed in an ancillary administration?
  - And more
- *Kelly J. Zech*

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