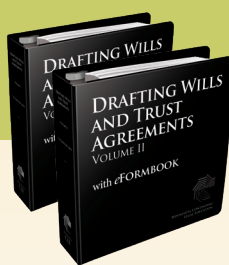


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ESTATE PLANNING FOR THE NON-SPECIALIST

Attend in Person
Wednesday, July 22, 2026

ESTATE PLANNING FOR THE NON-SPECIALIST

Spotlighting the Important Estate Planning Matters Every Attorney Should Know

This **updated** seminar provides an overview of the estate planning issues you're likely to encounter in your non-estate planning practice. Our faculty of esteemed estate planning practitioners will discuss:

- Understanding Important **Estate Planning Terms and Concepts**
- **Estate Planning Starter Pack** (and a Few Upgrades)
- **10 Facts** You Should Know about the **Minnesota and Federal Estate Tax**
- **4 Ways** to Transfer **Real Estate** as Part of an Overall **Estate Planning Strategy**
- Estate Planning Strategies for **Business Owners**
- **Navigating Family Dynamics** to Create an Effective Estate Plan
- **Top 10 New Developments and Evolving Issues** in Estate Planning



Attend in Person – Wednesday, July 22, 2026
Minnesota CLE Conference Center; Minneapolis

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

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

9:05 – 10:05 a.m.

Estate Planning Basics: Terms and Concepts You Need to Know

Estate planning is the process of making it clearly known, in the event of a person's death or incapacity, who will oversee decision-making and the distribution of assets. This session will look at the key terms and concepts related to estate planning and probate – and explain how they function in estate law.

– *Omni N. Kiecker; Kiecker Law Office; Belle Plaine*

10:05 – 11:05 a.m.

Estate Plan Starter Pack (and a Few Upgrades)

As mentioned in the first session, there are many important legal documents you should consider drafting when preparing an estate plan. This session will review the estate plan starter pack, or core estate planning documents, that every estate plan needs – wills, power of attorneys, and health care directives. Additionally, this session will introduce additional estate planning documents to consider including trusts, guardianship designation forms, beneficiary designation forms, and letters of intent.

– *Serena O'Neil; Spencer Fane LLP; St. Cloud*

11:05 – 11:15 a.m. BREAK

11:15 a.m. – 12:00 p.m.

10 Facts You Should Know About the Minnesota and Federal Estate Tax

Your clients may be surprised to find out that the Minnesota or federal estate tax applies to their estate. While most estates will not incur federal estate tax because of the high exemption amount, the Minnesota exemption amount is much lower. Even if your client's estate is not large enough to owe federal or state estate tax, you will want to understand these laws to properly advise your clients. This session will explain the Minnesota and federal estate tax systems and will provide basic strategies for limiting your client's estate tax exposure.

– *Alison J. Midden; Taft Stettinius & Hollister LLP; Minneapolis*



12:00 – 1:00 p.m. LUNCH (on your own)

1:00 – 1:45 p.m.

4 Ways to Transfer Real Estate as Part of an Overall Estate Planning Strategy

Real estate is typically the most valuable asset owned by individuals. Ownership of real estate can take on many forms and conveys specific duties and rights based on that ownership. This session will explore planning strategies for transferring real estate. Topics include:

- Transfer on Death Deeds
- Life Estates
- Revocable Trusts
- Wills

– *Callyn T. Bedker; Bedker Law, PLLC; Redwood Falls*

1:45 – 2:30 p.m.

Estate Planning Strategies for Business Owners

One of the biggest challenges for business owners is succession and estate planning to ensure their businesses are managed properly during life and upon their death. This session will focus on important things to consider when working with business owners to ensure that their closely-held business succession goals and objectives are met – whether that means transferring it to family during their lifetime or upon their death, selling it to key employees, or selling it to a third party.

– *Joshua C. Hillger; Best & Flanagan LLP; Minneapolis*

2:30 – 2:45 p.m. BREAK

2:45 – 3:30 p.m.

Navigating Family Dynamics to Create an Effective Estate Plan

Understanding a family's dynamics in estate planning is very important. When a client comes in the door and asks for a "simple will" many times there is more to it. What begins as a straightforward estate plan can become quite complex. This session will cover common issues that can occur within families and how to plan for them. Specifically, this session will explore tips and best practices when there are multiple marriages, antenuptial agreements, disagreements among family members and the potential complexities surrounding the selection of attorneys in fact, trustees and personal representatives.

– *Courtney R. Sebo Savica; Sebo Savica Law Firm, PLLC; Rochester*

3:30 – 4:30 p.m.

Electronic Wills and Other Estate Planning Documents

This session provides an overview of the legal landscape in Minnesota given an increasing focus on donor intent. Topics include harmless error, electronic wills, remote notarization, and other electronic estate planning documents.

– *Cameron R. Kelly; Cummins & Bonestroo Law Office PLLC; Stillwater*

– *J. Steve Nys; Fryberger, Buchanan, Smith & Frederick, P.A.; Duluth*

ESTATE PLANNING FOR THE NON-SPECIALIST

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