GENERAL INFORMATION

LIVE IN PERSON
Monday & Tuesday,
September 28 & 29, 2026
Minnesota CLE Conference Center
600 Nicollet Mall, Suite 370
Third Floor City Center, Minneapolis

ONLINE REPLAY
Thursday & Friday,
November 12 & 13, 2026
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 **9.0 CLE credits, including 1.0 ethics credit applied for.** The maximum number of total credits attendees may report for this seminar is 9.0.

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. Paid registrants who do not cancel and are unable to attend will retain access to all seminar materials through their Minnesota CLE website account.

QUESTIONS?
customerservice@minncle.org
www.minncle.org
800-759-8840

Register at www.minncle.org

The High-Net-Worth Institute

Monday & Tuesday, September 28 & 29, 2026 – Attend In Person
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600 Nicollet Mall, Suite 370, Minneapolis

Can't attend the live seminar?
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Register online at www.minncle.org
Email **customerservice@minncle.org** or call **800-759-8840** for assistance.

TUITION:
$445 MSBA member
$445 paralegal
$495 standard rate

SEASON PASSHOLDERS:
- **Super Passholders** may attend the in-person seminar or the online replay at no charge.
- **In-Person Passholders** may attend the in-person seminar at no charge or the online replay for 50% off.
- **Online Passholders** may attend the in-person seminar for 50% off or the 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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RECYCLABLE

50 YEARS 1976-2026

View information on your mobile device or register online.

BRAND NEW INSTITUTE!

The **High-Net-Worth** Institute

Monday & Tuesday, September 28 & 29, 2026 – Attend In Person

MINNESOTA CONTINUING LEGAL EDUCATION
Your Success Is Our Goal

BRAND NEW INSTITUTE!

The High-Net-Worth Institute

A Multidisciplinary Institute for Advisors to High-Net-Worth Clients

Join Us for the First High-Net-Worth Institute!

INSTITUTE TOPICS INCLUDE:
- The New Federal Landscape: Planning After Permanence
- What's New in Tax Mitigation
- Issues That Arise in High-Net-Worth Divorces
- GST Tax and Dynasty Trust Design
- Irrevocable Trust Design Masterclass
- Lifetime Giving Strategies for High-Net-Worth Clients
- Working with the Wealth Management Team
- And More!

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Make sure you are prepared to help your high-net-worth clients!

Monday, September 28

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

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

9:05 – 10:05 a.m.
The New Federal Landscape: Planning After Permanence
What the permanent higher federal exemption means for high-net-worth planning: resetting client conversations, revisiting "use it or lose it" structures, and where the real federal pressure points remain.
– *Robert W. Dietz*
– *Andrew T. Howard*

10:05 – 11:05 a.m.
What's New in Tax Mitigation: The Year in Review
Recent legislation, IRS priority guidance and enforcement targets, notable Tax Court and Eighth Circuit decisions, and Minnesota legislative and Department of Revenue developments every advisor to wealthy clients should know.
– *Tessa Mielke*

11:05 – 11:15 a.m.
BREAK

11:15 – 12:15 p.m. Breakout Session A

101
Issues That Arise in High-Net-Worth Divorces
– *James Vedder*

102
GST Tax and Dynasty Trust Design
Generation-skipping transfer tax fundamentals, exemption allocation traps and how to fix partial allocations, dynasty trust architecture, and considerations on trust administration when moving between jurisdictions with different rules against perpetuity.
– *Sonny Miller*

12:15 – 1:15 p.m. Lunch Break (provided to attendees)

FUN, FOOD & FOGO!

Join fellow attendees at Fogo de Chão for a complimentary lunch, conveniently located in the same building as the Conference Center. Enjoy Fogo's Market Table which has over 40 different options, refreshing beverages, and casual conversation with colleagues in a relaxed setting.

1:15 – 2:15 p.m. Breakout Session B

201
Irrevocable Trust Design Masterclass Part I – Grantor Trusts
SLATs, grantor trust powers, swap powers, and toggling grantor trust status – building flexibility into structures that are supposed to be unchangeable.
– *Caitlin Abram*

202
Domicile, Residency and the Snowbird Problem
Minnesota residency audits, the 183-day rule, changing domicile to Florida, Arizona, or South Dakota, and what actually survives a Department of Revenue challenge.
– *Alison J. Midden*

2:15 – 2:30 p.m.
BREAK

2:30 – 3:30 p.m. Breakout Session C

301
Lifetime Giving Strategies for High-Net-Worth Clients
GRATs, installment sales to intentionally defective grantor trusts, annual exclusion leverage, and front-loading strategies – choosing the right transfer technique for the right client.
– *Michael P. Sampson*

302
The Cabin and Family Recreational Real Estate
Cabin LLCs vs. cabin trusts (vs. QPRTs or other options), governance and use agreements, expense sharing, buyout and exit mechanisms – keeping the lake place from dividing the family.
– *J. Steve Nys*

3:30 – 3:45 p.m.
BREAK

3:45 – 4:45 p.m. Breakout Session D

401
Cross-Border Planning for High-Net-Worth Clients
– *Daniel R. Donovan*

402
Best Practices for Advising High-Net-Worth Clients with Family Limited Partnerships and Limited Liability Companies
– *Katherine A. Charipar*

4:45 – 5:15 p.m.
Institute Reception
Join your friends and colleagues for tasty refreshments, great conversation, and networking.

Tuesday, September 29

8:30 – 9:00 a.m.
CONTINENTAL BREAKFAST

9:00 – 10:00 a.m. Breakout Session E

501
Charitable Planning for High-Net-Worth Clients
Charitable remainder and lead trusts, donor-advised funds vs. private foundations, gifts of closely held business interests, and integrating philanthropy with the estate and income tax plan.
– *Kassandra K. Heinrich-Wydra*
– *Kyle Wesely*

502
Irrevocable Trust Design Masterclass Part II – Other Design Techniques and Implementation of Trusts
Rules against perpetuities, modification and decanting, directed trusts, and trust administration
– *Rachel M. Dahl*

10:00 – 10:15 a.m.
BREAK

10:15 – 11:15 a.m.
Ethics: Who Is My Client?
1.0 ethics credit applied for
Joint representation of spouses, representing the family vs. the family business, multigenerational representation, and gifts or bequests to the drafting attorney.
– *Eric T. Cooperstein*

11:15 – 11:20 a.m.
BREAK

11:20 – 12:20 p.m.
Working with the Wealth Management Team: Roles, Boundaries and the UPL Line
Coordinating with CPAs, financial advisors, trust officers, and family offices; confidentiality and privilege in team settings; fee arrangements and referrals; and where the unauthorized practice of law line falls for non-lawyer advisors.
– *Robert P. Lawson*
– *Mark Moeller*
– *Julie Westbrock*
– *Philip J. Ruce, moderator*

Faculty & Planners

CAITLIN ABRAM
NorthRock Partners
Minneapolis

▶ LAUREN G. BARRON
Graber Law LLC
Minnetonka

KATHERINE A. CHARIPAR
Fredrikson & Byron P.A.
Minneapolis

ERIC T. COOPERSTEIN
Law Office of Eric T. Cooperstein, PLLC
Minneapolis

RACHEL M. DAHL
Dewitt LLP
Minneapolis

ROBERT W. DIETZ
Berstein Private Wealth Management
Minneapolis

DANIEL R. DONOVAN
Faegre Drinker Biddle & Reath LLP
Minneapolis

KASSANDRA K. HEINRICH-WYDRA
Markve, Zweifel & Heinrich, PLLC
Maple Grove

ANDREW T. HOWARD
Taft Stettinius & Hollister LLP
Minneapolis

▶ ROBERT P. LAWSON
Palisade Asset Management, LLC
Minneapolis

ALISON J. MIDDEN
Taft Stettinius & Hollister LLP
Minneapolis

TESSA MIELKE
Dorsey & Whitney LLP
Minneapolis

SONNY MILLER
Dorsey & Whitney LLP
Minneapolis

MARK MOELLER
Ascent Private Capital Management of U.S. Bank
Minneapolis

J. STEVE NYS
Fryberger, Buchanan, Smith & Frederick, P.A.
Duluth

▶ PHILIP J. RUCE
Stone Arch Law Office, PLLC
Minneapolis

MICHAEL P. SAMPSON
Maslon LLP
Minneapolis

JAMES VEDDER
Cozen O'Connor
Minneapolis

KYLE WESELY
Wesely & Wesely CPAs, Ltd.
Minnetonka

JULIE WESTBROCK
TrustPoint
Minneapolis

▶ PLANNING COMMITTEE MEMBER