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Planning & Drafting FOR THE Small Estate

Wednesday, October 21, 2026
Attend In Person

Planning & Drafting FOR THE Small Estate

Practical Strategies for Estates Up to \$3 Million

If you work with small estates, this course is for you! Practical and timely, it will help you better advise your clients.

HIGHLIGHTS INCLUDE:

- Making the most of the **initial client meeting**
- **Drafting Wills & Trusts**, including what to do when **multiple states** are involved
- **TODDs** and other **methods to transfer real estate**
- Understanding the available powers under the **Statutory Short Form Power of Attorney... and its limits**
- 5 things to know about **Medical Assistance eligibility**
- Understanding **advanced directives for health care** and **end of life planning**
- And much more!

Wednesday, October 21, 2026 – Attend In Person

Minnesota CLE Conference Center
600 Nicollet Mall, Suite 370, Minneapolis

CAN'T ATTEND IN PERSON?

View an Online Replay on Monday, November 9, 2026 or
Monday, November 23, 2026.



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COURSE INFORMATION

LIVE IN PERSON

Wednesday, October 21, 2026
Minnesota CLE Conference Center
600 Nicollet Mall, Suite 370
Third Floor City Center, Minneapolis

ONLINE REPLAY

Monday, November 9, 2026
Monday, November 23, 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.

CREDITS

Minnesota CLE is applying to the Minnesota State Board of CLE for **6.0 standard CLE credits**. The maximum number of total credits attendees may claim for this program is 6.0.

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 customerservice@minncle.org or **800-759-8840**.

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?

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

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

9:05 – 9:50 a.m. **Building Rapport and Getting the Information You Need**

Making the most of your initial client meeting is critical. Listening to what clients say...and what they don't say, sets the tone for your representation. Being cognizant of psychological and emotional aspects of estate planning start at the initial meeting as you discuss dual/multi-party representation; retainer agreements, engagement letters and not-retained letters; probate assets vs. non-probate assets; wills vs. trusts; considerations when working with cognitively impaired clients; and incapacity issues.

– Jody A. Cohen Press, Course Chair

9:50 – 10:50 a.m. **Effective Will and Trust Drafting for the Small Estate**

Get a comprehensive overview of will and trust formalities and legalities, including:

- Drafting testamentary trusts
- Choosing corporate vs. individual fiduciaries
- Consideration of pot trusts vs. separate share trusts
- Planning for tangible personal property and digital assets
- Drafting a codicil vs. a new will
- Drafting for minors and incapacitated beneficiaries
- When a living trust is indicated: accounting for real estate in multiple states

– Philip J. Ruce

10:50 – 11:00 a.m. BREAK

11:00 – 11:30 a.m. **Beneficial Beneficiary Designation Drafting for the Small Estate**

It is critical to regularly review and update beneficiary designations. This session will include a discussion of the following:

- The Minnesota Multiparty Accounts Act
- Revocation of beneficiary designation by marriage dissolution (Minn. Stat. § 524.2-804, *Sveen v. Melin*, and *In the matter of the Estate of Mathew Joseph Tomczik*)
- Rights of survivorship (Minn. Stat. § 524.6-204 and *Estate of Patrick W. Butler*)

– Thomas M. Johnston

11:30 a.m. – 12:00 p.m. **Distributions from Retirement Accounts and Other Tax Issues for the Small Estate**

Distributions from retirement accounts can be complex and have numerous tax issues. This session will help you:

- Gain a practical understanding of the complex tax implications surrounding distributions from retirement accounts
- Understand key tax considerations
- Learn planning opportunities
- Identify potential pitfalls associated with distributions

– James T. McNary

12:00 – 12:30 p.m. **Transfer on Death Deeds and Other Methods of Transferring Real Estate for the Small Estate**

Real estate is typically the most valuable asset owned by individuals. Ownership of real estate can take many forms and impacts specific duties and rights. This session will explore planning strategies for transferring real estate, including:

- Transfer on death deeds
- Life estates
- Revocable trusts
- Wills

– Callyn T. Bedker

12:30 – 1:05 p.m. LUNCH BREAK (on your own)

1:05 – 1:50 p.m. **Understanding Advanced Directives for Health Care and End of Life Planning**

This session will address challenges in addressing health care and end of life decisions. Topics will include:

- Comparing and contrasting health care directives, DNR/DNI forms, POLST's, and the Caregiver Act
- Helping clients overcome barriers to completing their directives

– Mary Frances M. Price

1:50 – 2:35 p.m. **Understanding the Available Powers of Attorney: "A-N" and Beyond**

Powers of Attorney are a critical estate planning tool. But it's important to understand how to use them. This session will explore:

- The powers and limitations of Attorneys-in-Fact
- The importance of selecting the right people for the job
- Remedies when things go wrong

– John P. Worrell

2:35 – 2:45 p.m. BREAK

2:45 – 3:30 p.m. **Integrating Long-Term Care Insurance into a Small Estate Plan**

The cost of long-term care keeps rising. Clients need to understand how to protect their assets while ensuring access to necessary care. This session will provide guidance on effectively advising clients and integrating long-term care insurance into small estate plans.

– Jody A. Cohen Press

– Elizabeth I. Wrobel

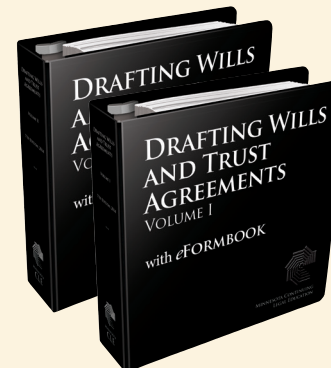
3:30 – 4:00 p.m. **5 Things Every Estate Planning Attorney Needs to Know About Medical Assistance Eligibility**

Learn five key points to know about Medical Assistance eligibility, including statutory references, applicable law, and estate recovery.

– Martha J. Amdahl

SPECIAL OFFER FOR ALL ATTENDEES:

25% OFF the *Drafting Wills and Trust Agreements Deskbook with eFormbook* – Simply the best resource available on estate planning in Minnesota!



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\$295 paralegal

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