

FACULTY

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DATED MATERIAL – PLEASE EXPEDITE!



Probating THE Difficult Estate

Probating THE Difficult Estate

Smart Strategies for Challenging Estates

Join an esteemed ensemble of experienced faculty for practical guidance on circumstances that can turn a routine probate into a difficult one.

TOPICS INCLUDE:

- Untangling closely held **business interests**
- **Prioritizing claims** in insolvent estates
- Avoiding or defusing **beneficiary battles**
- Choosing and applying **trust funding** formulas and strategies
- Managing estates with **international ties**
- Steering clear of **ethical challenges**

Take on these issues with confidence and keep those challenging estates moving toward resolution!

Tuesday, November 17, 2026 – Attend In Person

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

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COURSE INFORMATION

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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 – 9:20 a.m.
**When Probate Gets Complicated:
Recognizing the Red Flags**

Not every probate follows a predictable path. This short overview will set the stage for today's discussion topics.

– *Joshua C. Hillger*

9:20 – 10:20 a.m.
**When the Estate Includes a
Business: Probate Challenges
with Closely Held Companies**

What happens when a decedent leaves behind a business? Explore the unique challenges of administering estates with closely held business interests, including valuation, management and control, succession planning, and competing interests among beneficiaries.

– *Susan J. Markey*
– *Matthew J. Shea*
– *Joshua C. Hillger, moderator*

10:20 – 10:30 a.m. BREAK

10:30 – 11:15 a.m.
**Funding Formulas and Trust
Strategies: When the Numbers
Get Complicated**

Trust funding decisions can have significant tax and distribution consequences. Examine common funding formulas, the challenges of allocating assets among trusts, and strategies for addressing complications and avoiding costly mistakes.

– *Andrew T. Howard*

11:15 – 11:20 a.m. BREAK

11:20 a.m. – 12:05 p.m.
**When the Estate Can't Pay:
Insolvency and Creditor Claims
in Probate**

What happens when an estate has more debts than assets? Learn how to evaluate and prioritize creditor claims, protect estate assets, and avoid common pitfalls that can expose personal representatives to liability.

– *Spencer R. Riegelman*

12:05 – 12:20 p.m.
QUESTIONS & ANSWERS

12:20 – 1:00 p.m.
LUNCH BREAK (on your own)

1:00 – 1:45 p.m.
**When Beneficiaries Behave
Badly: Managing Conflict in
Probate**

Uncooperative, demanding, or feuding beneficiaries can derail even the most straightforward estate administration. Get practical strategies for managing expectations and handling disputes while keeping the probate process moving forward.

– *Annali Cler*
– *Denise S. Rahne*

1:45 – 1:50 p.m. BREAK

1:50 – 2:50 p.m.
**Probate Across Borders:
Handling Estates with Foreign
Ties**

Foreign beneficiaries, overseas assets, and international connections can introduce unexpected complications into estate administration. Explore the many issues that arise when a probate crosses international borders.

– *Jennifer A. Gumbel*

2:50 – 3:00 p.m. BREAK

3:00 – 4:00 p.m.
**Ethical Minefields in Probate:
Recognizing and Resolving
Difficult Issues**

1.0 ethics credit applied for

Probate practice presents unique ethical challenges, particularly when family conflicts, competing interests, and questions about representation arise. Examine common ethical dilemmas that arise when representing clients in probate proceedings.

– *Aram V. Desteian*

4:00 – 4:15 p.m.
QUESTIONS & ANSWERS

LOOKING FOR FURTHER RESOURCES?

Minnesota CLE has got you covered:

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