



----- CLE SEMINAR -----

39th Annual Estate Planning Update

*Endorsed by the Real Property,
Probate and Trust Law Section
of the State Bar of Wisconsin*

LIVE SEMINAR: **Friday, November 16, 2018 – Madison**
WEBCAST: **Friday, November 16, 2018**

REPLAY WEBCAST: **Wednesday, November 28, 2018**
WEBCAST: **Thursday, December 6, 2018**
WEBCAST: **Monday, December 10, 2018**
WEBCAST: **Tuesday, December 18, 2018**
WEBCAST: **Wednesday, December 26, 2018**

CLE CREDITS

7

39th Annual Estate Planning Update

7 CLE

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Preparing for the inevitable

More than half of American adults don't have a will.¹ While end-of-life planning isn't much fun for clients, having a knowledgeable lawyer can make the process much easier. Keep your skills sharp with insights and updates from the *39th Annual Estate Planning Update*.

Lawyers of all experience levels will better understand:

- Recent developments in state and federal case law and legislation
- Best practices for advising fiduciaries under the new trust code
- Special tax reporting requirements for trusts and estates qualifying for the 199A deduction
- An overview of collection matters in estate and gift taxes

In addition, learn to navigate issues that crop up when planning for small and modest estates, including:

- Probate/nonprobate transfers
- Special needs trusts
- ABLE accounts
- Wispact accounts

Issue issues

As medical advances provide new paths to create families, the question of legal issue may become more complicated. Discover who qualifies as issue when assisted reproductive technology is involved. Plus, understand the importance of clearly specifying which issue the estate or trust is to benefit.

Help your clients leave the legacy they want with current, relevant techniques from the *39th Annual Estate Planning Update*. **Register today!**

1. <https://www.caring.com/articles/wills-survey-2017>

Real Property, Probate, and Trust Law Section members receive a \$50 discount on the live and live webcast seminars and webcast replays of this program. Register now!

Schedule

8:00 AM Registration

8:30 AM Recent Developments in Estate Planning

- Federal case law
- Federal legislation
- Wisconsin case law
- Wisconsin legislation
H. Wes Taylor

9:45 AM Break

10:00 AM A 21st Century Estate Planning Issue: Who's Your Issue?

- Trusts and powers of appointment
- Class of beneficiaries
- State law impact
- Future medical developments
- Importance of drafting
Randy S. Nelson

11:00 AM Fiduciary Responsibilities in Wisconsin

- Advising trustees under the Wisconsin Trust Code
- Protecting attorneys that serve as trustee
Melissa S. Kampmann
Shanna N. Yonke

12:00 PM Lunch

1:15 PM The Only Sure Things: Death and Taxes

- Overview of collection matters in estate and gift cases
- IRS challenges in a year of budget cuts
Richard Charles Grosenick

2:15 PM Break

2:30 PM Planning Essentials for Small and Modest Estates

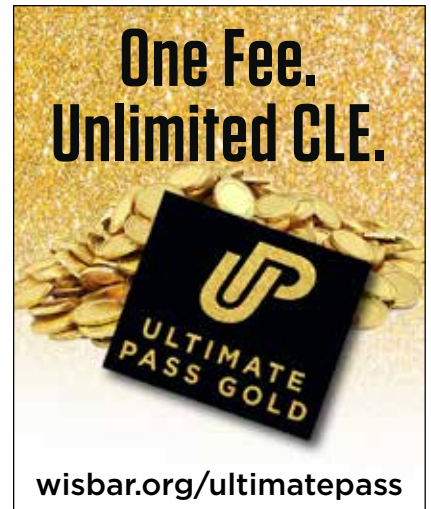
- Essential documents
- Maintaining the estate plan
- Considerations for guardianship
- Avoiding probate
- Common misconceptions and mistakes with revocable trusts
Dera L. Johnsen-Tracy

3:20 PM Fiduciary Income Taxation After the New Tax Law

- The TCJA as it applies to income taxation of trusts and estates
- The new Form 1041 deduction rules
- The new §199A deduction related to businesses owned by trusts and estates
Katie Hanley

4:10 PM Program Concludes

Following program start time, webcast replay schedule will vary slightly from above listed times.



**One Fee.
Unlimited CLE.**

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Faculty

Program Chairs and Presenters

Melissa S. Kampmann

Ruder Ware, L.L.S.C., Wausau

Randy S. Nelson

von Briesen & Roper, S.C., Milwaukee

Presenters

Richard Charles Grosenick

Internal Revenue Service Office of the Chief Counsel

Small Business/Self-Employed, Milwaukee

Katie Hanley

von Briesen & Roper, S.C., Milwaukee

Dera L. Johnsen-Tracy

Horn & Johnsen, S.C., Madison

H. Wes Taylor

Foley & Lardner LLP, Madison

Shanna N. Yonke

Ruder Ware, L.L.S.C., Wausau

Credits

This program has been submitted to the Wisconsin Board of Bar Examiners for up to **7.0 CLE credits**. It does not qualify for EPR credit. The live seminar and live webcast on November 16, 2018 will also be submitted for Minnesota credit.

Location

Madison, State Bar Center

5302 Eastpark Blvd., American Center,
(608) 257-3838

This program is sponsored by:



Who should attend

- Estate planning practitioners
- Probate lawyers
- Elder law attorneys
- Family law practitioners
- General practitioners

How you'll benefit

- Receive an overview of recent developments in state and federal case law and legislation
- Find out who qualifies as issue when assisted reproductive technology is involved
- Learn best practices for advising a fiduciary under the new trust code
- Gain insight into tax collection in estate and gift cases
- Explore a variety of issues in estate planning for small and modest estates
- Understand the unique tax reporting requirements of IRC Section 199A deductions

Additional Estate Planning Tools

Legal Issues of the Aging 2018

Explore Wisconsin's recently passed Uniform Adult Guardianship Jurisdiction Act (UAGJA). Find out how to determine diminished capacity in a client and what actions to take. Plus, review recent legislative, administrative, and case law changes. **7 CLE**

Webcast Replay: Oct. 4, 2018 | Oct. 9, 2018 | Oct. 15, 2018 | Oct. 24, 2018 | Nov. 1, 2018
Nov. 6, 2018 | Nov. 16, 2018 | Dec. 19, 2018 | Dec. 22, 2018 | Jan. 24, 2019

Wispact Update 2018

Become familiar with the sections of the Social Security POMS dealing with SNTs. Hear advice on creating clear, accurate Wispact Contribution Agreements. In addition, find out how a relocation impacts the portability of and access to the SNT. **7 CLE**

CLE OnDemand™ Seminar: #CA2745D | **Member:** \$249 | **Nonmember:** \$329

On Borrowed Time: Emergency Estate Planning – 2018

Find strategies and solutions for accelerating the process while ensuring you haven't overlooked anything. Discover ways to overcome mental capacity, communication, and guardianship issues. Understand actions to take based on the client's family structure or lack thereof, and much more. **7 CLE**

CLE OnDemand™ Seminar: #CA2772D | **Member:** \$249 | **Nonmember:** \$329

Marital Property Law in Wisconsin

It's a leading information source on Wisconsin's community property system. Find a thorough breakdown of key components, including property classification, mixing, tracing, management, and control.

Print Book: #AK0067; 1,968+ pp.; 4th ed. 2010; 3 Volumes; **Member:** \$249 | **Nonmember:** \$309
Books UnBound® Subscription: #AE0067 | **Member:** \$159 | **Nonmember:** \$199

Estate Planning/Probate Forms Library

Access nearly 300 forms, checklists, sample letters, sample documents, and more. Every document is fully customizable and regularly updated to ensure it complies with statutory specifications. Use it wherever you have an internet connection for fast, simple document preparation.

Online subscription: # FB7000 | **Member:** \$129 (Available only to State Bar members)

WisDocs Probate (Document Assembly System)

Creating probate forms is a cinch with this powerful, user-friendly, mobile system. Easily compile forms for all types of probate in Wisconsin, including formal and informal probate, summary settlement, summary assignment, and more.

Online subscription: # DA0002; **Member/Nonmember:** \$299 (Available only to attorneys)

Registration

Online: www.wisbar.org/seminars
credit card or Ultimate Pass only

Phone: (800) 728-7788 » credit card
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Fax: (608) 257-5502 » credit card
or Ultimate Pass only

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Registrations
P.O. Box 7158, Madison, WI
53707-7158
check, credit card, Passbooks, or
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State Bar CLE/PINNACLE

Passbook Registrations: Passbook
Certificates must be received by the
State Bar at least one business day prior
to the event. For live seminars, walk-in
registrations with Passbook Certificates
are welcome.

Registration Cancellations: Please
visit wisbar.org/cancellation_policy for
information on PINNACLE registration
cancellation policies.

Course materials for those attending the seminar

Course materials are provided in
PDF format and are downloadable
from myStateBar on wisbar.org up to
four days prior to and 90 days after
your seminar. The PDF format is ideal
for creating an electronic library that
is easily stored, searched, and shared.
Use a program like Adobe Reader or
GoodReader for iPad to access the
files from your computer, tablet, or
mobile device during the seminar,
to make notes electronically, or print
relevant sections ahead of time. **For
live seminar attendees who prefer
a printed format, please select the
tuition option that includes printed
materials for an additional \$20.**

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Priority Code: S 3 6 1 3 B

SEMINAR TUITION	LIVE SEMINAR: With PRINTED Course Materials	LIVE SEMINAR: With Downloadable (PDF) Course Materials	WEBCAST SEMINAR: With Downloadable (PDF) Course Materials
<input type="checkbox"/> State Bar Member	<input type="checkbox"/> \$239	<input type="checkbox"/> \$219	<input type="checkbox"/> \$249
<input type="checkbox"/> RPPT Section Member*	<input type="checkbox"/> \$189	<input type="checkbox"/> \$169	<input type="checkbox"/> \$199
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* The \$50 Real Property, Probate and
Trust Law section member discount
only applies to live, live webcast,
and webcast replay versions of this
seminar – not CLE OnDemand. RPPT
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are not eligible for this discount. The
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To purchase written course materials for those **not** attending this program, contact the State Bar at (800) 728-7788.

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MAIL TO: State Bar PINNACLE Registrations
P.O. Box 7158
Madison, WI 53707-7158

Event Code: CA2812 M W R R2 R3 R4 R5

BOOK SALE — Eckhardt's Workbook for Wisconsin Estate Planners

Save 20% on Eckhardt's Workbook for Wisconsin Estate Planners.
Use discount code **CA2812** when you order online or by calling
(800) 728-7788. * **Plus, all seminar attendees receive a free
two-week trial of the Books UnBound® version.**

Demystify the estate planning process with the book that
contains decades of expertise from some of Wisconsin's most
respected estate planning attorneys. Topics include:

- Document drafting
- Filing procedures
- Nonprobate transfers
- Wills with and without trusts
- Death taxes
- And much more



Print Book: #AK0047; 902+ pp.; 6th Edition, 2014 (includes 2017-18 supplement)
Member: ~~\$249~~ \$199.20 | **Nonmember:** ~~\$309~~ \$247.20

Books UnBound® Subscription: # AE0047
Member: ~~\$159~~ \$127.20 | **Nonmember:** ~~\$199~~ \$159.20

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