



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

Trust Disputes and Fiduciary Litigation: An In-Depth Review

LIVE SEMINAR: Friday, September 28, 2018 – Madison
WEBCAST: Friday, September 28, 2018

REPLAY WEBCAST: Thursday, October 11, 2018
WEBCAST: Monday, October 15, 2018
WEBCAST: Tuesday, October 23, 2018
WEBCAST: Wednesday, October 31, 2018
WEBCAST: Friday, November 9, 2018

CLE CREDITS

4

Trust Disputes and Fiduciary Litigation: An In-Depth Review

4 CLE

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September 28, 2018 | Madison

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Estate litigation made easier

If the thought of litigating a trusts & estates matter has you feeling in over your head, this is the seminar for you. *Trust Disputes and Fiduciary Litigation: An In-Depth Review* gives you the tools and techniques to tackle important estate litigation situations with confidence.

Learn how to approach proceedings involving:

- Claims against financial agents under powers of attorney
- Guardianships and working with guardians
- Creditors' claims in nonprobate transfers upon death
- Nonjudicial settlement agreements

All the essentials

Walk away equipped to:

- Handle breach of fiduciary duty claims
- Understand removal and accounting actions
- Counsel fiduciaries on how to avoid litigation altogether

Plus, find out what the latest trust code court decisions mean for estate litigation. You'll be ready to face a variety of situations whether you represent the estate or the fiduciary.

Register now!

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Schedule

- 8:00 AM Registration**
- 8:30 AM Recent Developments in Fiduciary Litigation**
- Wisconsin case law update – Trust Code cases
 - Other UTC states – notable cases
- 9:10 AM Strategies for Asserting and Defending Claims Against Fiduciaries**
- Removal and accounting actions
 - Breach of fiduciary duty claims
- 9:50 AM Special Issues in Trust and Estate Litigation: Aging Population and Capacity Questions**
- Guardianships
 - Claims against financial agents under powers of attorney
- 10:30 AM Break**
- 10:45 AM Non-Probate Transfers on Death**
- Creditors' claims
- 11:15 AM The Use of Nonjudicial Settlement Agreements in Alternative Dispute Resolution**
- Subject matter
 - Mechanics
 - Representation
- 11:55 AM Traps for the Unwary: Best Practices for Fiduciaries to Avoid Litigation**
- Adequate disclosure
 - Statutes of limitations
 - Consent, release, ratification
- 12:10 PM Program Concludes**

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

Faculty

Program Chairs & Presenters

Caitlyn B. Sikorski
Reinhart Boerner Van Deuren, S.C.
Milwaukee


David J. Sisson
Reinhart Boerner Van Deuren, S.C.
Milwaukee

Credits

This program has been submitted to the Wisconsin Board of Bar Examiners for up to **4.0 CLE credits**. It does not qualify for EPR credits. The live seminar and live webcast on Friday, September 28, 2018 will also be submitted for Minnesota credit.

Location

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



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Print Book: #AK0036; 665+ pp.; 4th ed. 2018

Member: ~~\$249~~ \$199.20 | **Nonmember:** ~~\$309~~ \$247.20

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Additional Learning Opportunities

Guardianship for the Civil Lawyer

Receive an introduction to types of guardianships and what guardians can and can't do. Explore the differences and similarities between guardianship of a minor and an adult. In addition, review protective placement and the guardianship of incompetent persons. **5 CLE/1 EPR**

Live Seminar and Live Webcast: Oct. 3, 2018 – Milwaukee

Webcast Replay: Oct. 16, 2018 | Oct. 24, 2018 | Oct. 29, 2018 | Nov. 2, 2018 | Nov. 12, 2018

29th Annual Institute of Trial Practice (ABOTA)

Watch and learn from the best trial lawyers in the state by immersing yourself in this popular trial demonstration. Discover techniques for effective openings, closings, and direct and cross examinations. Plus, hear reasoning from plaintiff and defense attorneys about their approaches and strategies. **10 CLE**

Live Seminar and Live Webcast: Nov. 8, 2018 – Milwaukee

Webcast Replay: Nov. 21, 2018 | Nov. 27, 2018 | Dec. 7, 2018 | Dec. 10, 2018 | Dec. 15, 2018 | Dec. 20, 2018 | Dec. 26, 2018 | Jan. 4, 2019 | Jan. 7, 2019 | Jan. 15, 2019 | Jan. 24, 2019

Probate for the Civil Lawyer – 2017

Gain insight into Wisconsin probate proceedings from experienced practitioners and Registers in Probate. Learn specific probate procedures and when a hearing is required. Also, discover when and how civil litigation intersects with probate proceedings. **5 CLE**
CLE OnDemand Seminar: #CA2647D; **Member:** \$249 | **Nonmember:** \$329

Wisconsin Civil Procedure Before Trial

It's your guide to complex state and local rules. Outlines proper procedure for pretrial stages of a typical litigation case. This book addresses questions and issues at every step of the way – from the common to the complex.

Print Book: #AK0166; 1,244+ pp.; 6th ed. 2017-2018; **Member:** \$219 | **Nonmember:** \$269

Books UnBound® Subscription: #AE0166; **Member:** \$159 | **Nonmember:** \$199

Wisconsin Probate System: Forms and Procedures Handbook

Maximize the effectiveness of your formal and informal probate processes. This book summarizes Wisconsin probate law and is packed with practice aids. Probate like a pro from planning through summary procedures. (Includes 2016-17 supplement)

Print Book: #AK0076; 719+ pp.; 4th ed. 2012; **Member:** \$219 | **Nonmember:** \$269

Books UnBound® Subscription: #AE0076; **Member:** \$159 | **Nonmember:** \$199

WisDocs Probate Document Assembly System

This online document assembly tool makes creating accurate forms a cinch. Simply select the form to create. An interview tool guides you in filling in all necessary information. Then one click assembles the required provisions and fills in your answers to create a completed document.

Online Subscription: #DA0001; **Member:** \$299/year (lawyers only)

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Course materials for those attending the seminar

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format is ideal for creating an
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Priority Code: S 3 6 0 9 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"/> \$209	<input type="checkbox"/> \$189	<input type="checkbox"/> \$219
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Who should attend:

- General practitioners
- In-house counsel for fiduciaries
- Trusts & estates attorneys with limited litigation experience
- Civil litigators
- Solo and small-firm lawyers
- Financial advisors

How you'll benefit:

- Understand the crossover of civil litigation and trusts & estates practices
- Learn techniques for avoiding litigation
- Explore the procedural and substantive essentials of the Wisconsin Trust Code
- Discover how the Rules of Civil Procedure apply to estate litigation
- Hear a discussion on practical and transactional issues in estate litigation

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