



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

Handling a Basic Probate

**BUILD
YOUR
PRACTICE**

*This Build Your Practice Series program is endorsed by the
Young Lawyers Division of the State Bar of Wisconsin*

LIVE SEMINAR: Friday, February 22, 2019 | Madison
WEBCAST: Friday, February 22, 2019

REPLAY WEBCAST: Friday, March 8, 2019
WEBCAST: Thursday, March 14, 2019
WEBCAST: Wednesday, March 20, 2019
WEBCAST: Tuesday, March 26, 2019
WEBCAST: Monday, April 1, 2019

CLE CREDITS
6

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Probate from A-Z

Considering nearly 6 out of 10 Americans are without estate planning documents like a will or power of attorney,¹ almost every family will need probate assistance at some point.

Whatever your comfort level with probate practice, equip yourself to counsel clients through this challenging process confidently and compassionately with tips from *Handling a Basic Probate*.

Learn from the probate pros

Hear from a panel of experienced probate lawyers as they offer time-tested techniques for:

- Gathering information
- Initiating the estate
- Choosing formal vs. informal probate
- Handling claims against the estate
- Dealing with feuding family members
- Navigating estate tax and income tax issues
- Making the final accounting
- Closing the estate

Keep probate from adding pain to a grieving family. **Register now!**

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

Who should attend:

- New attorneys starting out in probate
- Established lawyers new to probate
- Experienced probate attorneys seeking a refresher

How you'll benefit:

- Receive a comprehensive overview of probate proceedings
- Know what to do at every stage in the probate process
- Understand income and inheritance tax implications
- Learn which form of accounting is best to use

Schedule

8:00 AM Registration

8:30 AM Deciding on the Procedure/ The Initial Interview and Gathering of Information

- Client conference checklist
- Summary procedures
- Choosing formal or informal procedures
- Transferring net-probate assets
David P. Weller

9:30 AM Initiation of the Estate

- Filing the petition/ application
- Notice requirements – who needs to know
- Preparing a budget
- Marshaling assets and preparing an inventory
F. Brian McElligott

10:10 AM Break

10:25 AM Claims Against the Estate

- Requirements for a claim/ giving notice to known creditors
- Procedures for contest
- Priority in an insolvent estate
- Marital property issues
Thomas J. Kroll

10:55 AM Estate Tax Returns

- What assets to include and how to value them
- Allowable deductions
- Required attachments
- Filing thresholds
Thomas J. Kroll

11:55 AM Question and Answer

12:05 PM Lunch (on your own)

1:15 PM Income Tax Considerations

- Decedent's final return
- Fiduciary income tax returns
- Interplay with death tax
David P. Weller

2:15 PM Final Accounting, Distribution and Closing the Estate

- Final accounting valuations
- Alternate methods for closing an administration
- Timing of distributions
- Handling distributions to minors and trusts
- Filing the statement to close/final judgment
F. Brian McElligott

3:05 PM Question and Answer

3:15 PM Program Concludes

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

Young Lawyers Save \$20!*

PINNACLE knows that you're at the critical point in your career where you're developing your skills and practice, which is why Young Lawyers Division Members receive \$20 off any of the Build Your Practice seminars.

**Young Lawyers Division Members are State Bar member attorneys 36 years of age or younger, or within five years of admission to the State Bar of Wisconsin. If you've opted out of YLD, you will not receive this discount.*

Faculty

Program Chairs/Presenters

F. Brian McElligott

Law Offices of F. Brian McElligott
Wauwatosa

Thomas J. Kroll

Thomas J. Kroll Attorney at Law
Whitefish Bay

David P. Weller

Boardman & Clark, LLP
Madison

Credits

This program has been submitted to the Wisconsin Board of Bar Examiners for up to **6.0 CLE credits**. It does not qualify for EPR credits. The live and live webcast seminars on February 22, 2019 will be also submitted for Minnesota CLE credits.

Location

Live Seminar

Madison, State Bar Center

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

BOOK SALE!

Wisconsin Probate System: Forms and Procedures Handbook

Save 20% on *Wisconsin Probate System: Forms and Procedures Handbook*. Use discount code **CA2883** 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**.

Streamline your probate process. Find a comprehensive summary of Wisconsin probate law along with the tools to successfully and efficiently probate an estate. Chapters include:

- Probate Practice Aids
- Planning the Representation
- Informal Probate
- Formal Probate
- Summary Procedures

Print Book: #AK0076; 719+ pp; 4th ed., 2012 (includes 2016-17 supplement)

Member: ~~\$219~~ \$175.20 | **Nonmember:** ~~\$269~~ \$215.20

Books UnBound® Subscription: #AE0076

Member: ~~\$159~~ \$127.20 | **Nonmember:** ~~\$199~~ \$159.20

*Discount applies to both print and digital Books UnBound® editions of this title and cannot be applied to previous purchases. Offer valid as long as CLE credit is available for this program. For Books UnBound users, discount may be applied to purchase of individual Books UnBound title only and may not be used on purchase of full library.



Additional Learning Opportunities

Trust Disputes and Fiduciary Litigation: An In-Depth Review – 2018

Understand the crossover of civil litigation and trusts & estates practices. Learn techniques for avoiding litigation. Discover how the Rules of Civil Procedure apply to estate litigation. Also, explore the procedural and substantive essentials of the Wisconsin Trust Code. **4 CLE**

CLE OnDemand Seminar: #CA2821D | **Member:** \$219 | **Nonmember:** \$299

Wispect Update 2018

Become familiar with the sections of the Social Security POMS dealing with SNTs. Find out how a relocation impacts the portability of and access to the SNT. Discover tips for handling the human side of SNT situations, and more. **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 also ensuring you haven't overlooked anything. Discover ways to overcome mental capacity, communication, and guardianship issues. In addition, understand actions to take based on the client's family structure or lack thereof. **7 CLE**

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

Wisconsin Judicial Benchbook vol V: Probate, Guardianship, and Mental Health

It's the ultimate guide to case prep and litigation in these special situations. Find explanations of formal and informal probate, probate alternatives, guardianship and conservatorship, plus AODA, criminal, and mental commitments. (Incl. 2018-19 supp.)

Print Book: #AK0029; 520+ pp.; 5th ed. 2016-17 | **Member:** \$149 | **Nonmember:** \$189

Books UnBound® Subscription: #AE0029 | **Member:** \$159 | **Nonmember:** \$199

A Handbook for Personal Representatives

Does a client have a court-appointed guardian? Know someone who's going to act as a guardian? Let this handbook be their guide. Covers guardian responsibilities, appointment, and specific duties for guardians of estates and persons.

Single copy: #GC0003 | **Member:** \$3 | **Nonmember:** \$4

Pack of 25: #GC0003A | **Member:** \$60 | **Nonmember:** \$80

Estate Planning/Probate Forms Library

Easily access nearly 300 forms, checklists, and sample documents, including motions, notices, marital property agreements, and powers of attorney. Every form is fully customizable and regularly updated.

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

Registration

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

Phone: (800) 728-7788 » credit card
or Ultimate Pass only

Fax: (608) 257-5502 » credit card
or Ultimate Pass only

Mail: State Bar PINNACLE
Registrations
P.O. Box 7158, Madison, WI
53707-7158
check, credit card, Passbooks, or
Ultimate Pass

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 37 01 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"/> YLD Member*	<input type="checkbox"/> \$219	<input type="checkbox"/> \$199	<input type="checkbox"/> \$229
<input type="checkbox"/> Nonmember	<input type="checkbox"/> \$319	<input type="checkbox"/> \$299	<input type="checkbox"/> \$329
<input type="checkbox"/> Ultimate Pass Subscriber	<input type="checkbox"/> \$20	<input type="checkbox"/> \$0	<input type="checkbox"/> \$0
<input type="checkbox"/> Passbook Certificate User	<input type="checkbox"/> \$20 + 1 Certificate	<input type="checkbox"/> 1 Certificate	<input type="checkbox"/> 1 Certificate

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Mail to: State Bar PINNACLE Registrations
P.O. Box 7158
Madison, WI 53707-7158

Event Code: CA2883 M W R R2 R3 R4 R5

About the Build Your Practice Series

The Build Your Practice Series from State Bar of Wisconsin PINNACLE® introduces you to the fundamentals of various practice areas. Gain the tools and information you need to develop a new area of practice and expand your firm's offerings. Build Your Practice Series programs are endorsed by the State Bar's Young Lawyers Division.



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