



40th Annual Estate Planning Update

Program dates start November 21. Register today!

7.5 CLE

40th Annual Estate Planning Update

This program is endorsed by the Real Property, Probate, and Trust Law Section of the State Bar of Wisconsin

A wealth of information

Keep your skills sharp with insights and updates from the *40th Annual Estate Planning Update*. Stay abreast of recent developments in state and federal case law and legislation, plus review the latest revisions coming to the trust and estate accounting rules.

Lawyers of all experience levels will better understand:

- What to be aware of when estate planning for clients with special needs
- When and how to decant a trust
- How to plan for potential challenges to marital property agreements
- How to utilize directed trusts effectively
- Why using common boilerplate provisions in trust documents is risky
- How to cut through the confusion surrounding judicial review of an agent's actions

Who should attend:

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

How you'll benefit:

- Hear about the latest revisions included in the Uniform Fiduciary Income and Principal Act (UFIPA)
- Assess whether and how to decant a trust
- Help your clients provide for individuals with special needs in their estate plans
- Find out how to effectively utilize directed trusts
- Discover potential pitfalls of using boilerplate language in trust documents
- Understand ways to challenge or defend a marital property agreement
- Get your state and federal estate planning legislation and case law update

Register now!

Book Sale!

Eckhardt's Workbook for Wisconsin Estate Planners

Save 20% on Eckhardt's Workbook for Wisconsin Estate Planners.* Demystify the estate planning process with the book that contains decades of expertise from some of Wisconsin's most respected estate planning attorneys. Use discount code CA2932 when you order online at

wisbar.org or call (800) 728-7788. Plus, all seminar attendees receive a free two-week trial of the Books UnBound® version.

Print Book: #AK0047; 930+pp.; 7th ed. 2018-19
Member: ~~\$269~~ \$215.20 | Nonmember: ~~\$339~~ \$271.20

Books UnBound® Subscription: #AE0047_SUB
Member: ~~\$175~~ \$140 | Nonmember: ~~\$219~~ \$175.20

*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

4th Annual Family Business Update

Gain a checklist approach for exit planning options and strategies. Avoid missteps in the exit planning process by learning from others' mistakes. Find creative uses for trusts to protect a family business from issues with second spouses or from beneficiaries with substance abuse problems. Review the roles of trust protectors and directing parties. 7 CLE/1 EPR

Live Madison Seminar and Live Webcast: Dec. 11, 2019

Webcast Replays: Dec. 26, 2019 | Jan. 3, 2020 | Jan. 7, 2020 | Jan. 13, 2020 | Jan. 22, 2020
Jan. 30, 2020 | Feb. 5, 2020

Wisconsin Probate System: Forms and Procedures Handbook

Streamline the probate process with the indispensable resource many Wisconsin attorneys have come to rely on. All material dealing with estate and income taxes is gathered in one convenient chapter. Reduce the number of transmittal letters, phone calls, and client meetings with help from a Master Information List. The latest revision also includes e-filing instructions and tips.

Print Book: #AK0076; 750+ pp.; 5th ed. 2018-19; Member: \$235 | Nonmember: \$295

Books UnBound® Subscription: #AE0076_SUB; Member: \$175 | Nonmember: \$219

WisDocs Estate Planning — Document Assembly System

WisDocs Estate Planning is the State Bar of Wisconsin's newest document assembly system. Choose from expertly-crafted forms templates, then create and customize your estate planning document to integrate any special provisions or client requests. WisDocs operates through HotDocs Market, a cloud-based platform, which means you don't need to purchase, install, or maintain new software. Create one document or an entire estate plan with this mobile friendly, powerful tool!

Online Subscription: #DA0001; Lawyers Only: \$299

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 Fiduciary Accounting — What's Old is New Again

- Uniform Fiduciary Income and Principal Act (UFIPA)
 - Uses of unitrusts — conversion to and express
 - Governing law
 - Who is entitled to accountings
 - Drafting suggestions
- Randy S. Nelson*

10:50 AM Directed Trusts: Advantages of Dividing Administrative, Distribution, and Investment Roles

- Use as a flexible tool to separate the traditional role of a trustee into multiple distinct and specialized roles
 - Attractive planning solutions for clients with special assets and circumstances
- Melissa S. Kampmann, Shanna N. Yonke*

11:40 AM Lunch (on your own)

1:00 PM Reviewing and Potentially Revising “Irrevocable Trusts” Under the Wisconsin Trust Code

- Decanting
 - Non-judicial settlements
 - Trust protectors
 - Court proceedings
- David H. Patzer*

1:50 PM What Every Estate Planner Should Know About Special Needs Trusts

- Issue spotting — what estate planners should be aware of
 - Can you prepare the necessary documents?
 - When is referral to another attorney appropriate?
- Peter E. Grosskopf*

2:40 PM Break

2:55 PM What's Yours is Mine... Or Maybe Not? The Use of Marital Property Agreements in Estate Planning

- Wisconsin's marital property law
- Marital property agreements and their enforcement

- Until we say “I don’t” — marital property planning for divorce
 - ‘Til death do us part — marital property planning for death
- Megan L.W. Jerabek*

3:45 PM Fiduciary Litigation Trends that Impact Estate Planners

- *MacLeish v. Boardman* — expansion of liability to administration using the *Auric* standard and using purpose and intent clauses in trusts or wills
 - Trustee provisions regarding assets and investments — pitfalls of boiler plate provisions
 - Judicial review of an agent's actions under Wis. Stat. 244.16 — what planners should know about gifting and compensation
- Jeff A. Goldman*

4:45 PM Program Concludes

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

Dates Location

Live Seminar

Thursday, November 21, 2019
Radisson Milwaukee West
2303 N. Mayfair Rd., Hwy. 100 at North Ave.
Milwaukee, WI
(414) 257-3400

Live Webcast

Thursday, November 21, 2019

Webcast Replays

Wednesday, December 4, 2019
Thursday, December 12, 2019
Monday, December 16, 2019
Saturday, December 21, 2019
Thursday, December 26, 2019

Additional webcast replay dates are available for this program. Visit wisbar.org/seminars for more information and to register.

Credits

This program has been submitted to the Wisconsin Board of Bar Examiners for up to **7.5 credits**. It does not qualify for EPR credit.

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

Jeff A. Goldman
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Madison

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Eau Claire

Megan L.W. Jerabek
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Foley & Lardner LLP
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Shanna N. Yonke
Ruder Ware, L.L.S.C.
Wausau

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!

Registration

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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. For live seminar attendees who prefer a printed format, please select the tuition option that includes printed materials for an additional \$20.

This program is sponsored by:



40th Annual Estate Planning Update

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Seminar Date/Location:

- Live Seminar: Thursday, November 21, 2019 | Milwaukee
- Live Webcast: Thursday, November 21, 2019
- Webcast Replay: Wednesday, December 4, 2019
- Webcast Replay: Thursday, December 12, 2019
- Webcast Replay: Monday, December 16, 2019
- Webcast Replay: Saturday, December 21, 2019
- Webcast Replay: Thursday, December 26, 2019

** 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 members with Ultimate Passes, other CLE passes, or PINNACLE discounts are not eligible for this discount. The RPPT Section may discontinue this discount at any time.*

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