



Step-by-Step Estate Planning I

Program dates start January 30. Register today!

**7.5 CLE
1 EPR**

Step-by-Step Estate Planning I

Endorsed by the Young Lawyers Division and the Real Property, Probate & Trust Law Section of the State Bar of Wisconsin

We've got plans for you

Whether you're new to estate planning, need a refresher, or want to expand your skills, the *Build Your Practice Estate Planning Series* has something for you.

Step-by-Step Estate Planning I is a comprehensive overview of the foundational aspects of effective estate planning.

- Learn the nuts and bolts of drafting basic wills
- Receive an overview of estate and gift taxes
- Explore the different types of trusts and how to use them in planning
- Understand power of attorney and health care advance directives
- Find out how marital property agreements fit into estate planning
- Identify and avoid ethical pitfalls

Who should attend:

- Estate planners
- Elder law attorneys
- General practitioners
- New attorneys getting started in estate planning
- Established attorneys new to estate planning
- Experienced attorneys seeking a refresher

Register now!

Coming in spring 2020 – Step-by-Step Estate Planning II

Step-by-Step Estate Planning II builds on the fundamentals presented in *Estate Planning I* with more advanced trust and tax issues.

- Discover how to draft in compliance with federal and Wisconsin estate tax rules
- Know the rules of retirement benefits and IRAs
- Explore gifting techniques using trusts
- Learn planning strategies for second marriages, blended families, and unmarried couples
- Understand generation-skipping transfer taxes
- Find out how to use Family Limited Partnerships and LLCs

For more information and to register for

Step-by-Step Estate Planning II, visit wisbar.org/seminars

Dates / Location

Live Madison Seminar

Thursday, January 30, 2020
State Bar Center
5302 Eastpark Blvd.
Madison, WI
(608) 257-3838

Webcast Replays

Wednesday, February 12, 2020
Tuesday, February 18, 2020
Monday, February 24, 2020
Friday, March 6, 2020
Thursday, March 12, 2020

Live Webcast

Thursday, January 30, 2020

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

Credits

Step-by-Step Estate Planning I has been submitted to the Wisconsin Board of Bar Examiners for up to **7.5 CLE credits including 1 Ethics and Professional Responsibility credit**.

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 CA2961** 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
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^{*}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.



Also of Interest:

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; Members only: \$145

Schedule

8:00 AM Registration

8:30 AM Drafting a Basic Will

- Initial client interview
- Obtaining the information
- Intestate rules
- Elements of a good document
- Pitfalls – the need for clarity
- Coordinating with other documents
- Execution
- Updating the will

Philip J. Miller

9:30 AM An Introduction to Tax Issues in Estate Planning

- Overview of the Federal Estate Tax
- Overview of the Federal Gift Tax
- Overview of the Wisconsin Estate Tax
- Working with the marital deduction and unified credit

Philip J. Miller

10:30 AM Break

10:45 AM An Introduction to Tax Issues in Estate Planning (continued)

- Reducing taxable estates through lifetime gifting
- Generation-skipping transfer tax and other issues

Philip J. Miller

11:00 AM General Uses of Trusts in Estate Planning

- Testamentary vs. living trusts
- Revocable vs. irrevocable trusts
- Common uses of trusts
- Probate avoidance
- Grantor vs. non-grantor trusts for income tax purposes

Catherine M. Priebe

12:00 PM Lunch (on your own)

1:00 PM General Uses of Trusts in Estate Planning (continued)

- Special trusts
- Trust modification/termination and use of nonjudicial settlement agreements

Catherine M. Priebe

1:15 PM Avoiding Guardianship

- Powers of attorney
- Advanced health care directives

Philip J. Miller

1:45 PM Marital Property Agreements in Estate Planning

- Default property classification rules
- Types of agreements
- Uses of agreements
- Traps for the unwary
- Special considerations for life insurance and retirement plans
- Planning for assets in common law jurisdictions
- Alternatives to marital property agreements

Catherine M. Priebe

2:45 PM Break

3:00 PM Ethical Issues Faced by the Estate Planning Practitioner

- Identifying your client
- Joint representation of spouses
- Conflicts of interest
- Dealing with the disabled client
- Competence
- Confidentiality

Philip J. Miller

Catherine M. Priebe

4:00 PM Question and Answer

4:15 PM Program Concludes

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

Faculty

Philip J. Miller

Husch Blackwell LLP, Milwaukee

Catherine M. Priebe

Certus Legal Group, Ltd., Milwaukee

Real Property, Probate & Trust Law Section members save \$50 and Young Lawyers save \$20 on tuition for this program!

See registration panel in this brochure for more information.

Registration

Online: www.wisbar.org/seminars **Mail:** State Bar PINNACLE Registrations
Phone: (800) 728-7788 P.O. Box 7158
Fax: (608) 257-5502 Madison, WI 53707-7158

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.

Special Tuition Offers

Real Property, Probate & Trust Law Section members save \$50!*

RPPT Section members receive a \$50 discount on the live and live webcast seminars and webcast replays of this program.

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.

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

** Young Lawyers Division Members: State Bar member attorneys 36 years of age or younger or within 5 years of admission to the State Bar of Wisconsin. If you've opted out of YLD, you will not receive this discount. This discount cannot be combined with other discount offers.

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Step-by-Step Estate Planning I

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- Webcast Replay:** Thursday, March 12, 2020

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