



STATE BAR OF WISCONSIN
PINNACLE
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Navigating the Intersection of Estate Planning, Divorce, and Business Law

Program dates start January 29. Register today!

**8 CLE
1 EPR**

Navigating the Intersection of Estate Planning, Divorce, and Business Law

A trifecta of considerations

Family law, business law, and estate planning often involve overlapping issues. Explore the ways in which these practice areas frequently overlap, so you can more effectively serve your clients. Specifically, you'll take a look at what you should be considering before, during, and after a divorce, when you are dealing with:

- Estate plans
- Public benefits
- Family businesses
- Business shareholders and CEOs

You'll also discuss potential ethical issues and receive guidance on how to respond to tricky scenarios.

Who should attend:

- Family law attorneys
- Estate planning lawyers
- Business lawyers
- General practitioners

How you'll benefit:

- Gain perspective on how estate planning, family law, and business issues intersect, so you can provide more comprehensive representation
- Draft stronger agreements by understanding potential problems in other practice areas
- Learn what to do if your client dies in the middle of a divorce
- Understand how public benefits can be impacted by a divorce
- Earn 1.0 EPR credit by discussing ethical issues in these intersecting areas of law

Register now!

Dates / Location

Live Madison Seminar

Wednesday, January 29, 2020
State Bar Center
5302 Eastpark Blvd.
Madison, WI
(608) 257-3838

Webcast Replays

Tuesday, February 11, 2020
Thursday, February 20, 2020
Friday, February 28, 2020
Wednesday, March 4, 2020
Tuesday, March 10, 2020

Live Webcast

Wednesday, January 29, 2020

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 **8 CLE credits, including 1 Ethics and Professional Responsibility credit.**

Registration

Online: www.wisbar.org/seminars

Phone: (800) 728-7788

Fax: (608) 257-5502

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Registrations
P.O. Box 7158
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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 and video seminars, walk-in registrations with the Passbook Certificates are welcome.

Registration Cancellations: Please visit www.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.

Schedule

8:00 AM Registration

8:30 AM Estate Planning and Divorce

- Pre-divorce planning
- Post-divorce planning
- While the action is pending: durable powers of attorney, changing beneficiaries, and limitations on actions with or without a temporary order
Margaret W. Hickey, Mark J. Rogers

9:55 AM Ethics Counsel Reaction

Aviva Meridian Kaiser

10:00 AM Break

10:15 AM Public Benefit Considerations in Divorce

- How to amplify income available using public benefits
- What health benefits are available post-divorce to parties with disabilities?
- Are there benefits to consider for children?
Jessica A. Liebau

11:10 AM Ethics Counsel Reaction

Aviva Meridian Kaiser

11:15 AM Panel Discussion

- Best practices for estate planning changes during divorce
- Public benefits planning during or after a divorce
- Things we wish we had known earlier in our practice
Margaret W. Hickey, Jessica A. Liebau, Mark J. Rogers

12:00 PM Lunch (on your own)

1:00 PM Business Counsel and Divorce

- Document drafting: operating agreements and shareholder agreements
- Advisor during the divorce: who is the client?
- Discovery obligations
Kathryn M. Grigg

1:50 PM Family Businesses

- Succession planning: pre-divorce, during divorce, post-divorce
- Documents and clauses
Gregory M. Monday

2:40 PM Ethics Counsel Reaction

Aviva Meridian Kaiser

2:45 PM Break

3:00 PM Treatment of Gifted and Inherited Interests in Divorce

- Case law analysis post *Derr v. Derr*
- Gifted or inherited business interests
- Trust distributions: asset or income?
Linda S. Balisle

3:50 PM In Conclusion and In Practice: Ethics Issues

- Can I do estate planning for a couple and represent one later in a divorce?
- Business Counsel – when a CEO/shareholder is getting a divorce
- Representing the business and family members in estate planning
Aviva Meridian Kaiser

4:40 PM Program Concludes

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

Faculty

Program Chairs & Presenters

Linda S. Balisle

Balisle Family Law Legal Counsel, S.C.
Madison

Margaret W. Hickey

Becker, Hickey & Poster, S.C.
Milwaukee

Presenters

Kathryn M. Grigg

Axley Brynelson LLP
Madison

Aviva Meridian Kaiser

State Bar of Wisconsin
Madison

Jessica A. Liebau

Wessels & Liebau LLC
Mequon

Gregory M. Monday

Reinhart Boerner Van Deuren, S.C.
Madison

Mark J. Rogers

Angermeier & Rogers LLP
Milwaukee

Book Sale – Marital Property Law & Practice in Wisconsin

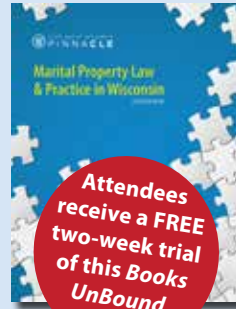
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Use discount code CA2991 when you order online at wisbar.org or call (800) 728-7788. Plus, all seminar attendees receive a free two-week trial of the *Books UnBound*® version.

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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. Find creative uses for trusts to protect a family business from family drama and impaired family members. Review trust protectors' and directing parties' roles. Navigate ethical issues that arise when representing closely held businesses and their owners. **7 CLE/1 EPR**

Webcast Replays: Jan. 30, 2020 | Feb. 5, 2020

Eckhardt's Workbook for Wisconsin Estate Planners

An estate planning classic, the *Workbook* provides quick and clear answers to questions about drafting wills, nonprobate transfers, death taxes, revocable trusts, gifts, marital property agreements, buy-sell agreements for closely held businesses, living wills, powers of attorney, and much more.

Print Book: #AK0047; 930+ pp.; 7th ed. 2018-19; **Member:** \$269 | **Nonmember:** \$339
Books UnBound® Subscription: #AE0047_SUB; **Member:** \$175 | **Nonmember:** \$219

Fillable Forms Libraries

Streamline your workflow with this central, online location for legal forms. Every form is reviewed and updated regularly to ensure it complies with all required statutory specifications.

Business Law Forms Library: #FSFB2000; **Members only:** \$95
Estate Planning/Probate Forms Library: #FSFB7000; **Members only:** \$145
Family Law Forms Library: #FSFB8000; **Members only:** \$145
Full Library (includes 8 practice areas): #FSFBZ000; **Members only:** \$679

Navigating the Intersection of Estate Planning, Divorce, and Business Law

Priority Code: S 3 8 2 5 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"/> \$249	<input type="checkbox"/> \$229	<input type="checkbox"/> \$259
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<input type="checkbox"/> Passbook Certificate User	<input type="checkbox"/> \$20 + 1 Certificate	<input type="checkbox"/> 1 Certificate	<input type="checkbox"/> 1 Certificate

Seminar Date/Location:

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