



STATE BAR OF WISCONSIN

PINNACLE

Your Practice. Our Purpose.



Bankruptcy – The Basics and Beyond

Program dates start May 27. Register today!

7.5 CLE
FOR EACH
FULL-DAY PROGRAM

Bankruptcy – The Basics and Beyond

Endorsed by the State Bar's Young Lawyers Division

Explore the options

Even as bankruptcy filings in Wisconsin have fallen to their lowest level in nine years, countless scenarios are still pushing people into insolvency.¹ Rising medical costs. Sky-high student loans. Crushing credit card debt. In this two-part series, leaders in Wisconsin bankruptcy practice will cover everything there is to know about Chapter 7 and Chapter 13 bankruptcy proceedings. Plan to attend one or both!

The Basics of Filing Chapter 7 and Chapter 13 will take you step-by-step through the process. It'll cover the essentials, giving you the legal know-how to confidently advise your clients through a consumer bankruptcy filing.

How you'll benefit:

- Learn the ins-and-outs of Chapters 7 and 13 – and when to use each chapter
- Know exactly which documents to file
- Understand the "means test" and how to use it to qualify clients for bankruptcy relief

Who should attend:

- Attorneys seeking to add bankruptcy to their practice
- Bankruptcy lawyers seeking a refresher
- Creditor/debtor attorneys

Beyond the Basics of Chapter 7 and Chapter 13 will take you step-by-step through the process. It'll cover the essentials, giving you the legal know-how to confidently advise your clients through a consumer bankruptcy filing.

How you'll benefit:

- Learn how pre-planning for bankruptcy can help your clients
- Understand how to handle community property in a bankruptcy case
- Go in-depth regarding discharge and dischargeability
- Learn the advanced means test
- Get debt-relief strategies

Who should attend:

- Attorneys with some experience in bankruptcy
- Bankruptcy lawyers seeking a refresher
- Creditor/debtor attorneys
- Attorneys who attended *The Basics*

Register today!

1. https://www.wiscnews.com/news/local/wisconsin-bankruptcy-filings-lowest-in-years/article_c3ef1c1c-0215-548b-933e-c60e187566d6.html

Registration Information

Four easy ways to register!

Online: www.wisbar.org/seminars

Phone: (800) 728-7788

Fax: (608) 257-5502

Mail: State Bar PINNACLE Registrations

P.O. Box 7158

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 two 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.**

NOTE: In the event of continuing public health concerns, the in-person attendance option for these seminars would be canceled and registrations transferred to the webcasts.

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.



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.*

The Basics of Filing Chapter 7 and Chapter 13

8:00 AM Registration

8:30 AM Setting the Stage

- The creditor toolbox
- Non-bankruptcy debt-relief options
James V. Block

8:50 AM Bankruptcy Concepts and Fundamentals

- The bankruptcy estate
- Basic differences between Chapter 7 and Chapter 13
- Selecting the proper chapter for your client
- Exemptions
- The automatic stay
- General procedures and timelines
J. David Krekeler

9:30 AM Getting Started: The Initial Consultation and Gathering of Information

- Attorneys as debt-relief agencies
- What to cover at the initial consultation
- 527 notices
- The fee agreement
Michael J. Maloney

10:15 AM BYP Players Present: Sample Debt-Relief Consultation

Rebecca R. Garcia, J. David Krekeler

10:30 AM Break

10:45 AM Preparing to File

Rebecca R. Garcia

11:20 AM Chapter 7 Means Test

- What income to report and how
- What deductions to take
- What the United States Trustee won't tell you
J. David Krekeler

12:00 PM Lunch (on your own)

1:00 PM Prosecuting the Simple Chapter 7 Case

- What to file and when
- Amending schedules and dealing with unlisted creditors
- Wrapping up representation
Michael J. Maloney

BYP Players Present: Typical Trustee Meeting

*James V. Block, Rebecca R. Garcia,
J. David Krekeler*

2:00 PM Role of the Chapter 7 Trustee

- Where the trustee comes from
- What trustees look for
- Administration of assets (why does it take so long?)
James V. Block

2:15 PM Collateral: Redeem, Reaffirm, or Surrender (Or Lien Avoid)

J. David Krekeler

2:30 PM Introduction to Discharge and Dischargeability

J. David Krekeler

2:45 PM Break

3:00 PM The Chapter 13 Means Test and the Chapter 13 Plan

- Doing the math – figuring income and allowed expenses on the means test
- Using checklists
- It is YOUR Chapter 13 plan – tell the trustee and the creditors who you are paying and how much they will receive
- Calculating feasibility – make sure the math works within the plan
Rebecca R. Garcia

3:35 PM Prosecuting the Simple Chapter 13

- The role of the Chapter 13 trustee
- Timing of filing
- Instructing your clients when and how to make trustee and mortgage payments
- Getting the trustee to recommend your plan for confirmation
- Trustee disbursements to creditors – including attorneys fees
Rebecca R. Garcia, Michael J. Maloney

4:15 PM Question and Answer

4:30 PM Program Concludes

Faculty

James V. Block

Krautkramer & Block LLC
Wausau

Rebecca R. Garcia

Chapter 13 Trustee
Oshkosh

J. David Krekeler

Krekeler Strother, S.C.
Madison

Michael J. Maloney

Watton Law Group
Milwaukee

Dates & Location

LIVE MADISON SEMINAR:

Wednesday, May 27, 2020

State Bar Center

5302 Eastpark Blvd.
Madison, WI
(608) 257-3838

LIVE WEBCAST:

Wednesday, May 27, 2020

WEBCAST REPLAYS:

Wednesday, June 3, 2020

Tuesday, June 9, 2020

Thursday, June 18, 2020

Wednesday, June 24, 2020

Monday, June 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 **7.5 CLE credits**. It does not qualify for EPR credits.

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

Beyond the Basics of Chapter 7 and Chapter 13

8:00 AM Registration

8:30 AM Pre-Bankruptcy Planning

- What it is and why it should be done
- Pitfalls and penalties

James V. Block

9:20 AM Marriage, Divorce, and Bankruptcy

- Community property and the bankruptcy estate
- Community property and the bankruptcy discharge
- Bankruptcy strategies for married couples
- Bankruptcy strategies for divorcing couples

J. David Krekeler

10:00 AM Serial Filings and Converting Between Cases

- Effect of serial filing and converting between cases
- Serial filing and the marital discharge
- Serial filing strategies

Michael J. Maloney

Proof of Claim

- Types of claims
- When to file a claim
- How to complete the claim form

Rebecca A. Quiroz

10:30 AM Break

10:45 AM Contested Matters, Objections to Proofs of Claim, and Adversary Proceedings, Oh My!

- What are they?
- How do you bring them?
- How do you respond to them?
- Proper service and why it's important
- Steps to getting a default judgment

Rebecca A. Quiroz

11:05 AM Prosecuting and Defending Relief from Stay Motions

Michael J. Maloney

11:20 AM Chapter 13 – Defending Motions to Dismiss

Rebecca A. Quiroz

11:35 AM Chapter 13 – Lien Avoidance and Objections to Claims and Plans

J. David Krekeler

12:00 PM Lunch (on your own)

1:00 PM Discharge and Dischargeability in Depth

- Comparing Chapter 7 and Chapter 13 exceptions to discharge
- Dealing with the most common issues
- Prosecuting a discharge or dischargeability case

James V. Block

1:25 PM Advanced Means Test and Totality of Circumstances

- Beyond the “basic” means test
- Totality: the “other hammer”
- The asset Chapter 7

Michael J. Maloney

2:15 PM Break

2:30 PM Preferences, Fraudulent Transfers

- What is a bankruptcy preference?
- Affirmative defenses to a preference claim
- Fraudulent transfers and the bankruptcy estate

J. David Krekeler

3:05 PM Potpourri!

- Attorney Fees and Getting Paid

Michael J. Maloney

- A Bit About Chapter 11 and Chapter 12
- Student Loans

J. David Krekeler

- 15 Cases You Need to Know About
- After-Acquired Assets

James V. Block

- Death of the Debtor
- Sale/Purchase During Plan

Rebecca A. Quiroz

4:15 PM Question and Answer

4:30 PM Program Concludes

Faculty

James V. Block

Krautkramer & Block LLC
Wausau

J. David Krekeler

Krekeler Strother, S.C.
Madison

Michael J. Maloney

Watton Law Group
Milwaukee

Rebecca A. Quiroz

Chapter 13 Trustee
Oshkosh

Dates & Location

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Friday, June 19, 2020

State Bar Center

5302 Eastpark Blvd.
Madison, WI
(608) 257-3838

LIVE WEBCAST:

Friday, June 19, 2020

WEBCAST REPLAYS:

Thursday, June 25, 2020

Tuesday, June 30, 2020

Wednesday, July 8, 2020

Monday, July 13, 2020

Wednesday, July 22, 2020

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Bankruptcy – The Basics and Beyond

Priority Code: S 3 8 5 1 T B

SEMINAR TUITION for EACH full-day seminar	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
<input type="checkbox"/> YLD Member*	<input type="checkbox"/> \$229	<input type="checkbox"/> \$209	<input type="checkbox"/> \$239
<input type="checkbox"/> Nonmember	<input type="checkbox"/> \$329	<input type="checkbox"/> \$309	<input type="checkbox"/> \$339
<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

I will attend the following seminar(s):

The Basics of Filing Chapter 7 and Chapter 13

- Live Seminar – Wednesday, May 27, 2020 | Madison
- Live Webcast – Wednesday, May 27, 2020
- Webcast Replay – Wednesday, June 3, 2020
- Webcast Replay – Tuesday, June 9, 2020
- Webcast Replay – Thursday, June 18, 2020
- Webcast Replay – Wednesday, June 24, 2020
- Webcast Replay – Monday, June 29, 2020

Beyond the Basics of Chapter 7 and Chapter 13

- Live Seminar – Friday, June 19, 2020 | Madison
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- Webcast Replay – Tuesday, June 30, 2020
- Webcast Replay – Wednesday, July 8, 2020
- Webcast Replay – Monday, July 13, 2020
- Webcast Replay – Wednesday, July 22, 2020

Lawyer State Bar Member No. _____

Nonlawyer Profession _____

Name _____

Firm Name _____

Address _____

City/State/Zip _____

Phone Number _____

Email _____

Payment: Tuition Amount Enclosed \$ _____

State Bar Passbook Certificate (enter certificate number) # _____

Check enclosed (payable to State Bar PINNACLE)

Ultimate Pass Gold Subscriber

Ultimate Pass Silver Subscriber

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Signature _____

To purchase written course materials for those not attending this program, contact the State Bar at (800) 728-7788.

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

Event Codes: Basics – CA3011 M W R R2 R3 R4 R5
Beyond – CA3012 M W R R2 R3 R4 R5

Book Sale!

Collections and Bankruptcy in Wisconsin

Save 20% on *Collections and Bankruptcy in Wisconsin*. One of the few Wisconsin-specific books providing a detailed overview of bankruptcy and collections in a single volume. Whether you represent creditors or debtors, it provides practical advice on how to protect your clients' interests.

Attendees receive a FREE two-week trial of this Books UnBound title

Use **discount code CA3011** 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.

Print Book: #AK0250; 311+ pp.; 2nd ed. 2015-16 (Includes 2017-18 supplement)

Member: ~~\$160~~ \$128 | **Nonmember:** ~~\$200~~ \$160

Books UnBound® Subscription: #AE0250_SUB

Member: ~~\$175~~ \$140 | **Nonmember:** ~~\$219~~ \$175.20

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Additional Learning Opportunities

Annual Bankruptcy Update 2019 – Eastern District/Western District

Receive valuable insight from U.S. Bankruptcy Court judges. Learn when Chapter 13 bankruptcy might be the best option for your small-business owner clients. Discuss how the Small Business Reorganization Act creates a new type of Chapter 11 debtor. Explore the shifting demographics of bankruptcy filers. **7.5 CLE**

CLE OnDemand Seminar: #CA2930D (East) / #CA2931 (West);

Member: \$259 | **Nonmember:** \$339

Udderly Broke: How to Liquidate & Sell the Family Farm

This excerpt from the 2019 Wisconsin Solo & Small Firm Conference (WSSFC) discusses the winding down and selling of a family farming operation. It covers topics such as whether to liquidate through bankruptcy or receivership, the tax implications of sales, issues to consider when drafting sale documents, and exemptions. **1 CLE**

CLE OnDemand Seminar: #IN0225D2 | **Member:** \$89 | **Nonmember:** \$139

Marital Property Law & Practice in Wisconsin

Quickly find the answer to any question involving marital property and/or property classification. Touching on both practical legal and ethical issues, this book is useful for anyone practicing in the areas of family law, taxation, bankruptcy/creditor-debtor, and estate planning.

Print Book: #AK0067; 860+ pp.; 5th ed. 2018-19; **Member:** \$269 | **Nonmember:** \$339

Books UnBound® Subscription: #AE0067_SUB; **Member:** \$175 | **Nonmember:** \$219

The 2020 Build Your Practice Series programs are sponsored by:

