STATE BAR OF WISCONSIN
PINNACLE
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41st Annual Estate Planning Update

Program dates start November 19. Register today!

7 CLE

41st Annual Estate Planning Update

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

Assess the best planning options for your clients

Keep your skills sharp with insights and updates from the *41st Annual Estate Planning Update*. Stay abreast of recent developments in state and federal case law and legislation, review the meaning of routine trust provisions, plus review procedural gaps in Wisconsin's Trust and Probate Codes.

Lawyers of all experience levels will better understand:

- Planning options for married couples, e.g., use of the optimal marital deduction formula
- Considerations for drafting trusts
- 529 plans and how they're passed down if unused
- How the economy and interest rates impact charitable planning choices
- And more!

Who should attend:

- Estate planning practitioners
- Probate attorneys
- Elder law attorneys
- General practice attorneys

How you'll benefit:

- Help clients address marriage and children in their estate plans
- Counsel clients on their best options for navigating real estate ownership
- Get a refresher in common issues in drafting trusts
- Stay up-to-date with legislative and case law developments
- Understand how to deal with ambiguities in the trust and probate codes

Register now!

Registration

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.

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 *my*StateBar on wisbar.org up to two days prior to and 90 days after your seminar.

Schedule

8:30 AM **Recent Developments in Estate Planning**
- Federal case law
- Federal legislation
- Wisconsin case law
- Wisconsin legislation

H. Wes Taylor, Joseph M. Higgins

9:45 AM **Break**

10:00 AM **Nelson's Rules of Thumb When Estate Planning for Married Couples**
- Most common estate plans used
- Factors to consider
- Impact of marital property law
- Impact of tax exemptions
- Rules of thumb for when to consider each plan

Randy S. Nelson

11:15 AM **Drafting Trusts: The Good, the Bad, and What Does That Mean?**
- Clauses mandating the consideration of other resources
- How to handle vacancies in appointed positions
- Don't forget your tax apportionment clauses
- Drafting for flexibility
- Common trust terms

Ashley L. Hawley, Melissa S. Kampmann

12:15 PM **Lunch Break**

1:15 PM **When You Are Ready to Give, But They Are Not Ready to Receive — Lifetime Gift Planning to Minors**
- Funding 529 and ABLE Accounts
- Gifting to custodial accounts
- Planning with irrevocable trusts

Megan L. W. Jerabek

2:05 PM **The Estate Planner's Real Estate Toolbox**
- Probate avoidance strategies
- Using trusts and LLCs to manage co-owned real estate
- Marital property considerations
- Wisconsin's real estate transfer fee and exemptions

Benjamin P. Brunette, Melissa Cover Selinger

2:55 PM **Break**

3:10 PM **Dealing with Ambiguities in Estate and Trust Procedure**
- Overview of procedural gaps and ambiguities in the Trust Code (Ch. 701) and Probate Code (Ch. 879)
- How lawyers and courts have dealt with these issues
- Proposed changes to the statutes to address them
- Best practices for commencing a proceeding, notice, the scope of the initial hearing, objections, and other procedural issues

Jeff A. Goldman

4:10 PM **Program Concludes**

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

Dates

Live Webcast

Thursday, November 19, 2020

Webcast Replays

Wednesday, December 2, 2020
Thursday, December 10, 2020
Monday, December 14, 2020
Saturday, December 19, 2020
Wednesday, December 23, 2020
Thursday, December 31, 2020

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

Credits

This program will be submitted to the Wisconsin Board of Bar Examiners for up to **7.0 credits.** It does not qualify for EPR credit.

Faculty

Program Chairs & Presenters

Melissa S. Kampmann
Ruder Ware, L.L.S.C., Wausau

Randy S. Nelson
von Briesen & Roper, S.C., Milwaukee

Presenters

Benjamin P. Brunette
Selinger & Brunette LLC, Madison

Jeff A. Goldman
DeWitt LLP, Madison

Ashley L. Hawley
Ruder Ware, L.L.S.C., Wausau

Joseph M. Higgins
Foley & Lardner LLP, Madison

Megan L.W. Jerabek
von Briesen & Roper, S.C., Madison

Melissa Cover Selinger
Selinger & Brunette LLC, Madison

H. Wes Taylor
Foley & Lardner LLP, Madison

Real Property, Probate, and Trust Law Section members receive a $50 discount on this seminar. Register now!

Additional Learning Opportunities

Legal Issues of the Aging 2020

Gain strategies for adjusting your practice during COVID-19. Advise clients on whether they need to revise or revisit estate and retirement plans. Explore changes in processing Medicaid renewals and other eligibility issues. Receive your annual case law update. **7.5 CLE**

Webcast Replays: Oct. 20, 2020 | Oct. 28, 2020 | Nov. 6, 2020 | Nov. 19, 2020
Nov. 30, 2020 | Dec. 8, 2020 | Dec. 16, 2020

Marital Property Law & Practice in Wisconsin

Quickly find the answer to any question involving marital property and/or property classification. Useful for any practitioner in the areas of family law, taxation, bankruptcy/creditor-debtor, and estate planning.

Print Book: #AK0067; 860+ pp.; 5th ed. 2018-19; **Member:** $280 | **Nonmember:** $350
Books UnBound® **Subscription:** #AE0067_SUB; **Member:** $190 | **Nonmember:** $237.50

WisDocs Estate Planning – 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

This program is sponsored by:

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41st Annual Estate Planning Update

Priority Code: S3922B

SEMINAR TUITION Includes Downloadable (PDF) Course Materials	WEBCAST SEMINAR TUITION:
☐ RPPT Section Member*	☐ $209
☐ State Bar Member	☐ $259
☐ Nonmember	☐ $339
☐ Ultimate Pass Subscriber	☐ $0
☐ Passbook Certificate User	☐ 1 Certificate

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*Visit **wisbar.org/seminars** for additional webcast replay dates.*

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☐ Nonlawyer Profession______________________

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Event Code: CA3031 WR R2 R3 R4 R5 R6