Program dates start November 19. Register today!
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

Registrations

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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.

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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.

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Print Book:  #AK0047; 930+pp; 7th ed. 2018-19
Member:  $280  $224 | Nonmember:  $350  $280

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Register now!
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

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.

Credits

Real Property, Probate, and Trust Law Section members receive a $50 discount on this seminar. Register now!
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
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.
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41st Annual Estate Planning Update

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41st Annual Estate Planning Update

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