



Death and Dysfunction: Annual Fiduciary Litigation Update

Program dates start June 18. Register today!

**4 CLE
1 EPR**

Death and Dysfunction: Annual Fiduciary Litigation Update

A violation of trust?

You or your client suspect suspicious dealings by someone acting in a fiduciary capacity. What's your next move?

Death and Dysfunction: Annual Fiduciary Litigation Update will cover all the bases. Using facts from real-world cases, presenters will share what should be considered in a variety of scenarios. From understanding preemptive measures to take when defending claims to knowing the appropriate remedies to pursue when prosecuting against fiduciaries, you'll come away with winning strategies.

Plus, attendees of the live webcast will be able to test their estate litigation acumen throughout the program via anonymous polling.*

How you'll benefit:

- Assess available claims and remedies when suspicious fiduciary activity is detected
- Defend fiduciaries who are accused of wrongdoing
- Receive a case law update
- Add more litigation strategies to your arsenal
- Avoid ethical mishaps when representing individuals and fiduciaries

Who should attend:

- General practitioners
- In house counsel for fiduciaries
- Trusts & estate attorneys
- Civil litigators
- Solo and small firm practitioners
- Financial advisors

Register now!

* Polling features will be disabled for webcast replays and CLE OnDemand, but poll results will still be shared.

Schedule

8:30 AM Recent Developments in Fiduciary Litigation

- Wisconsin case law update
- Notable cases in other jurisdictions

9:00 AM Prosecuting Claims Against Agents, Trustees and Other Fiduciaries

- Claims against agents
 - ▶ Authority, duties, liability
 - ▶ Remedies
- Trust-related claims
 - ▶ Authority, duties, liability
 - ▶ Remedies
- Other civil claims
 - ▶ Intentional interference with expected inheritance
 - ▶ Conversion
 - ▶ Civil theft
 - ▶ Unjust enrichment
 - ▶ Claims against spouses
- Strategic considerations and case studies

10:30 AM Break

10:45 AM Defending Claims Against Fiduciaries

- Risk mitigation
 - ▶ Adequate disclosure
- Preemptive court proceedings
 - ▶ Instructions
 - ▶ Approval of accounts

11:15 AM Ethical Issues in Representation of Individuals and Fiduciaries

- Determining which members of the family you represent and which of their respective business interests
- Effectively using engagement letters to clarify the scope of your representation
- Representing spouses in estate planning
- Deciding what to do when a client might be incapacitated
- Avoiding liability for breach of fiduciary duty when a client fails to follow court orders

12:05 PM Program Concludes

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

Faculty

Program Presenters

Caitlyn B. Sikorski

Reinhart Boerner Van Deuren, S.C.
Milwaukee

David J. Sisson

Reinhart Boerner Van Deuren, S.C.
Milwaukee

Dates

Live Webcast

Friday, June 18, 2021

Webcast Replays

Thursday, June 24, 2021

Wednesday, June 30, 2021

Tuesday, July 6, 2021

Monday, July 12, 2021

Wednesday, July 21, 2021

Tuesday, July 27, 2021

Thursday, August 5, 2021

Credits

This program will be submitted to the Wisconsin Board of Bar Examiners for **4 CLE credits including 1 Ethics and Professional Responsibility credit.**

Registration

Online: www.wisbar.org/seminars

Phone: (800) 728-7788

Fax: (608) 257-5502

Mail: State Bar of Wisconsin
PINNACLE 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.

Registration Cancellations

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.

Book Sale!

Eckhardt's Workbook for Wisconsin Estate Planners

SAVE 20% on *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.

Use **discount code CA3052** 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 (Incl. 2020-21 supplement)

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Books UnBound Subscription: #AE0047_SUB

Member: ~~\$190~~ \$152 | **Nonmember:** ~~\$237.50~~ \$190

^{*}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.



Other Learning Opportunities

Issues and Remedies in Inheritance Litigation – 2021

Learn strategies for contesting and defending cases involving common inheritance disputes. Sort out finances after funds have been transferred to a beneficiary through a joint account. Protect the trustee from liability with best practices for distributions. Resolve property division disputes within blended families.

CLE OnDemand Seminar: CA3141D; **Member:** \$109 | **Nonmember:** \$159

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Priority Code: S 3 9 7 8 B

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<input type="checkbox"/> Nonmember	<input type="checkbox"/> \$309
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