



42nd Annual Estate Planning Update

Program dates start November 12. Register today!

7.5 CLE

42nd Annual Estate Planning Update

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

Keep your estate planning skills sharp

Whether your clients want to sell their business and give a portion of the proceeds to charity or they have concerns about paying for a nursing home, this annual update brings you current estate planning techniques for a range of timely topics. Attorneys of all experience levels will benefit from discussions on developments in state and federal case law and legislation, as well as insights on the latest estate planning approaches and best practices.

How you'll benefit:

- Assess the best planning options for Wisconsin clients moving out of state
- Find techniques for charitable planning for sale of a business or other assets
- Analyze whether to take on the role of trust protector
- Issue spot for clients who may need to enter a nursing home
- Review best practices for working with elderly clients
- Navigate claims at death when there is no probate
- Know the latest in state and federal estate planning legislation and case law

Who should attend:

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

Register now!

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

See registration panel in this brochure for more information and to register.

Credits

This program will be submitted to the Wisconsin Board of Bar Examiners for **7.5 CLE credits**. It does not qualify for EPR credit.

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

This program is sponsored by:



HINDMAN



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 What to Do When Your Wisconsin Client is Moving to a Separate Property State

- To preserve the tax benefits of the full basis adjustment
 - To minimize issues with WDOR
 - To avoid probate and ancillary administration
 - To deal with practical issues
- Randy S. Nelson*

10:50 AM Utilizing Trust Protectors in Practice

- What is the role of the Trust Protector in trust documents and are there limits on the Trust Protector's authority?
 - Is the Trust Protector serving in a fiduciary or non-fiduciary capacity?
 - Utilizing the Trust Protector in "real life"
- Melissa S. Kampmann*

11:45 AM Lunch Break

1:00 PM Charitable Planning for Sales of Businesses and Other Assets

- Timing of donation
 - Amount of charitable deduction
 - Income recognized upon donation
 - Unrelated business taxable income to charity
 - S corporation stock traps
- Aaron J. Foley*

1:50 PM What Every Estate Planning Attorney Should Know About Medicaid Eligibility

- Medicaid eligibility for an individual
 - Medicaid eligibility for a married couple
 - Medicaid eligibility due to gifts and transfers
 - Estate recovery
- Mark D. Munson*

2:40 PM Break

2:55 PM Where Estate Planning and Elder Law Collide: Considerations for Working with Older Clients

- Understanding capacity standards and assessing client capacity
 - Best practices for avoiding document contests
 - Navigating conflicts of interest in "elder" estate planning and long-term care planning
 - Addressing elder abuse while preserving client autonomy
- Jessica A. Liebau*

3:45 PM Claims at Death When There is No Probate

- Funded revocable trusts
 - Joint tenancies
 - Life insurance and retirement benefits
 - Notices
 - Statute of limitations
- Victor J. Schultz*

4:35 PM Program Concludes

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

Dates

Live Webcast

Friday, November 12, 2021

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

Webcast Replays

Thursday, November 18, 2021

Wednesday, November 24, 2021

Tuesday, November 30, 2021

Saturday, December 4, 2021

Monday, December 6, 2021

Thursday, December 16, 2021

Tuesday, December 21, 2021

Monday, December 27, 2021

Faculty

Program Chairs & Presenters

Melissa S. Kampmann

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

Randy S. Nelson

von Briesen & Roper, S.C.
Milwaukee

Presenters

Aaron J. Foley

von Briesen & Roper, S.C.
Milwaukee

Joseph M. Higgins

Foley & Lardner LLP
Madison

Jessica A. Liebau

Wessels & Liebau LLC
Mequon

Mark D. Munson

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

Victor J. Schultz

Prairie Trust
A Division of Waukesha State Bank
Oconomowoc

H. Wes Taylor

Foley & Lardner LLP
Madison

Book Sale!

Marital Property Law & Practice in Wisconsin

SAVE 20% on *Marital Property Law & Practice in Wisconsin*.
Plus, all seminar attendees receive a free two-week trial of the Books UnBound® version. 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.

Use discount code CA3147 when you order online at wisbar.org/ak0067 or by calling (800) 728-7788.

Print Book: #AK0067; 860+ pp.; 5th ed. 2018-19
Member: ~~\$290~~ \$232 | Nonmember: ~~\$363~~ \$290.40

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*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.



Additional Learning Opportunities

Unwrapping the Elements of Gifts Causa Mortis

Receive a refresher on the basic requirements for a valid will. Understand the elements that satisfy a gift causa mortis. Explore probate avoidance techniques. Stay current on issues affecting estate administration in Wisconsin. 1 CLE

CLE OnDemand Seminar: #CA3206D; Member: \$89 | Nonmember: \$139

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. (Includes 2020-21 supplement)

Print Book: #AK0047; 930+ pp.; 7th ed. 2018-19; Member: \$290 | Nonmember: \$363
Books UnBound Subscription: #AE0047_SUB; Member: \$199 | Nonmember: \$248.75

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 powerful, mobile-friendly tool.

Online Subscription: #DA0001; Lawyers Only: \$299

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Priority Code: S 4 0 1 4 B

| SEMINAR TUITION Includes Downloadable (PDF) Course Materials | WEBCAST SEMINAR TUITION: |
|--|--|
| <input type="checkbox"/> RPPT Section Member | <input type="checkbox"/> \$219 |
| <input type="checkbox"/> State Bar Member | <input type="checkbox"/> \$269 |
| <input type="checkbox"/> Nonmember | <input type="checkbox"/> \$349 |
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*The \$50 Real Property, Probate and Trust Law Section discount applies ONLY to live webcast and webcast replay versions of this seminar – not CLE OnDemand. RPPT members with Ultimate Passes, other CLE passes, or PINNACLE discounts are not eligible for this discount. The Real Property, Probate and Trust Law Section may discontinue this discount at any time.

Mail to: State Bar PINNACLE Registrations
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