



# Step-by-Step Estate Planning I

**Program dates start April 29. Register today!**

**7.5 CLE  
1 EPR**

# Step-by-Step Estate Planning I

Endorsed by the State Bar of Wisconsin's Real Property, Probate & Trust Law Section and Young Lawyers Division

## We've got plans for you

Whether you're new to estate planning, need a refresher, or want to expand your skills, the *Build Your Practice Estate Planning Series* has something for you.

**Step-by-Step Estate Planning I** is a comprehensive overview of the foundational aspects of effective estate planning.

- Learn the nuts and bolts of drafting basic wills
- Receive an overview of estate and gift taxes
- Explore the different types of trusts and how to use them in planning
- Understand power of attorney and health care advance directives
- Find out how marital property agreements fit into estate planning
- Identify and avoid ethical pitfalls

## Who should attend:

- Estate planners
- Elder law attorneys
- General practitioners
- Young Lawyers Division members
- Real Property, Probate & Trust Law Section members
- New attorneys starting out in estate planning
- Established attorneys new to estate planning
- Experienced estate planners seeking a refresher

**Register now!**

## 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.



## Dates

### Webcast Seminar

Thursday, April 29, 2021  
Friday, May 7, 2021  
Thursday, May 13, 2021  
Wednesday, May 19, 2021  
Tuesday, May 25, 2021  
Thursday, June 3, 2021  
Monday, June 7, 2021  
Tuesday, June 15, 2021  
Wednesday, June 23, 2021

*The April 29, 2021 prerecorded presentation will include a live Q&A session with the presenters. All portions of this program for subsequent webcast dates will be prerecorded.*

## Credits

**Step-by-Step Estate Planning I** will be submitted to the Wisconsin Board of Bar Examiners for up to **7.5 CLE credits including 1 Ethics and Professional Responsibility credit.**

## Registration

**Online:** [www.wisbar.org/seminars](http://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](http://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](http://wisbar.org) up to two days prior to and 90 days after your seminar.

**Real Property, Probate & Trust Law Section members save \$50!** This RPPT Section member discount applies only to the webcast seminar – not *CLE OnDemand*. RPPT Section members using Ultimate Passes, other CLE passes, or other discounts are not eligible for this offer. The RPPT Section may discontinue this discount at any time.

**Young lawyers save \$20!** Young Lawyers Division Members receive \$20 off any of the Build Your Practice Series 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.)

# Schedule

- 8:30 AM Drafting a Basic Will**
- Initial client interview
  - Obtaining the information
  - Intestate rules
  - Elements of a good document
  - Pitfalls – the need for clarity
  - Coordinating with other documents
  - Execution
  - Updating the will
- Philip J. Miller*
- 9:30 AM An Introduction to Tax Issues in Estate Planning**
- Overview of the Federal Estate Tax
  - Overview of the Federal Gift Tax
  - Overview of the Wisconsin Estate Tax
  - Working with the marital deduction and unified credit
- Philip J. Miller*
- 10:30 AM Break**
- 10:45 AM An Introduction to Tax Issues in Estate Planning (continued)**
- Reducing taxable estates through lifetime gifting
  - Generation-skipping transfer tax and other issues
- Philip J. Miller*
- 11:00 AM General Uses of Trusts in Estate Planning**
- Testamentary vs. living trusts
  - Revocable vs. irrevocable trusts
  - Common uses of trusts
  - Probate avoidance
  - Grantor vs. non-grantor trusts for income tax purposes
- Catherine M. Priebe*
- 12:00 PM Lunch Break**
- 1:00 PM General Uses of Trusts in Estate Planning (continued)**
- Special trusts
  - Trust modification/termination and use of nonjudicial settlement agreements
- Catherine M. Priebe*
- 1:15 PM Avoiding Guardianship**
- Powers of attorney
  - Advanced health care directives
- Philip J. Miller*
- 1:45 PM Marital Property Agreements in Estate Planning**
- Default property classification rules
  - Types of agreements
  - Uses of agreements
  - Traps for the unwary
  - Special considerations for life insurance and retirement plans
  - Planning for assets in common law jurisdictions
  - Alternatives to marital property agreements
- Catherine M. Priebe*
- 2:45 PM Break**
- 3:00 PM Ethical Issues Faced by the Estate Planning Practitioner**
- Identifying your client
  - Joint representation of spouses
  - Conflicts of interest
  - Dealing with the disabled client
  - Competence
  - Confidentiality
- Philip J. Miller*  
*Catherine M. Priebe*
- 4:00 PM Question & Answer**
- 4:15 PM Program Concludes**

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

## Faculty

**Philip J. Miller**  
Husch Blackwell LLP, Milwaukee

**Catherine M. Priebe**  
Certus Legal Group, Ltd., Milwaukee

**Dive deeper into trust and tax issues at *Step-by-Step Estate Planning II***

Program dates start May 27, 2021. For more information and to register visit [wisbar.org/seminars](http://wisbar.org/seminars)

## 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 CA3178** 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)  
**Member:** ~~\$280~~ \$224 | **Nonmember:** ~~\$350~~ \$280

**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

### Wispect Update 2021

Get up-to-speed on the latest issues affecting SNTs. Receive a valuable case law update. Be able to explain financial tools to your clients. Know how to address ethical concerns that could impact your practice.

**Live Webcast:** April 30, 2021

**Webcast Replays:** May 7, 2021 | May 13, 2021 | May 19, 2021 | May 25, 2021  
 May 31, 2021 | June 9, 2021 | June 17, 2021

### Wisconsin Probate & Estate Planning Statutes 2021

Updated annually, this codebook keeps the most up-to-date Wisconsin laws at your fingertips. Find what you need faster with this convenient compilation of laws regulating probate and estate planning.

**Print Book:** #AK0432E21; 586+ pp.; 2021; **Member:** \$72 | **Nonmember:** \$93

### 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:*



## Step-by-Step Estate Planning I

Priority Code: **S 3 9 8 0 B**

SEMINAR TUITION <i>With downloadable (PDF) Course Materials</i>	WEBCAST SEMINAR:
<input type="checkbox"/> State Bar Member	<input type="checkbox"/> \$259
<input type="checkbox"/> RPPT Member**	<input type="checkbox"/> \$209
<input type="checkbox"/> YLD Member***	<input type="checkbox"/> \$239
<input type="checkbox"/> Nonmember	<input type="checkbox"/> \$339
<input type="checkbox"/> Ultimate Pass Subscriber	<input type="checkbox"/> \$0
<input type="checkbox"/> Passbook Certificate User	<input type="checkbox"/> 1 Certificate

### WEBCAST DATES\*

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Lawyer State Bar Member No. \_\_\_\_\_

Nonlawyer Profession \_\_\_\_\_

Name \_\_\_\_\_

Firm Name \_\_\_\_\_

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City/State/Zip \_\_\_\_\_

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**Payment: Tuition Amount Enclosed \$** \_\_\_\_\_

State Bar Passbook Certificate (enter certificate number) # \_\_\_\_\_

Check enclosed (payable to State Bar PINNACLE)

Ultimate Pass Gold Subscriber

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Event Code: CA3178 W R R2 R3 R4 R5 R6 R7 R8