



# Handling a Basic Probate

**Program dates start March 11. Register today!**

**6 CLE**

# Handling a Basic Probate

*Endorsed by the Young Lawyers Division of the State Bar of Wisconsin*

## Learn from the probate pros

Considering 2 out of 3 Americans are without estate planning documents like a will or power of attorney,<sup>1</sup> nearly every family will need probate assistance at some point. Are you prepared to assist them?

Whatever your comfort level with probate practice, ready yourself to counsel clients through this challenging process confidently and compassionately with tips from **Handling a Basic Probate**. Hear from a panel of experienced probate lawyers as they offer time-tested techniques for everything from gathering information and initiating the estate to dealing with feuding family members and handling claims against the estate.

## How you'll benefit:

- Receive a comprehensive overview of probate proceedings
- Know what to do at every stage in the probate process
- Understand income and inheritance tax implications
- Learn which form of accounting is best to use

## Who should attend:

- New attorneys starting out in probate
- Established lawyers looking to add probate to their practice
- Experienced probate attorneys seeking a refresher

Keep probate from adding pain to a family already grieving. **Register now!**

<sup>1</sup> Caring.com, 2021 Wills and Estate Planning Summary

## 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.

### Young lawyers save \$20!

PINNACLE knows that you're at the critical point in your career where you're developing your skills and practice, which is why Young Lawyers Division Members\* receive \$20 off any of the Build Your Practice Series seminars.

*\* Young Lawyers Division Members: 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.*

*This program is sponsored by:*



**Wisconsin Lawyers Mutual**  
INSURANCE COMPANY



## Schedule

**8:30 AM** **Deciding on the Procedure/The Initial Interview and Gathering of Information**

- Client conference checklist
- Summary procedures
- Choosing formal or informal procedures
- Transferring net-probate assets

*David P. Weller*

**9:30 AM** **Initiation of the Estate**

- Filing the petition/application
- Notice requirements – who needs to know
- Preparing a budget
- Marshaling assets and preparing an inventory

*F. Brian McElligott*

**10:10 AM** **Break**

**10:25 AM** **Claims Against the Estate**

- Requirements for a claim/giving notice to known creditors
- Procedures for contest
- Priority in an insolvent estate
- Marital property issues

*Thomas J. Kroll*

**10:55 AM** **Estate Tax Returns**

- What assets to include and how to value them
- Allowable deductions
- Required attachments
- Filing thresholds

*Thomas J. Kroll*

**11:55 AM** **Question and Answer**

**12:05 PM** **Lunch Break**

**1:15 PM** **Income Tax Considerations**

- Decedent's final return
- Fiduciary income tax returns
- Interplay with death tax

*David P. Weller*

**2:15 PM** **Final Accounting, Distribution and Closing the Estate**

- Final accounting valuations
- Alternate methods for closing an administration
- Timing of distributions

- Handling distributions to minors and trusts
- Filing the statement to close/final judgment

*F. Brian McElligott*

**3:05 PM** **Question and Answer**

**3:15 PM** **Program Concludes**

*Following program start time, schedule may vary slightly from above listed times*

## Dates

### Webcast Seminar

Friday, March 11, 2022  
Monday, March 21, 2022  
Wednesday, March 30, 2022  
Tuesday, April 5, 2022  
Thursday, April 14, 2022  
Friday, April 22, 2022  
Thursday, April 28, 2022  
Wednesday, May 4, 2022

*The March 11, 2022 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

This program will be submitted to the Wisconsin Board of Bar Examiners for up to **6 CLE credits**. It does not qualify for EPR credit.

### Unlock the Ultimate in CLE

With a State Bar of Wisconsin PINNACLE® Ultimate Pass™, you can access the continuing legal education seminars you need for one annual fee.

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Visit [wisbar.org/ultimatepass](http://wisbar.org/ultimatepass) to learn more.

## Faculty

### Presenters

**F. Brian McElligott**

Law Offices of F. Brian McElligott  
Wauwatosa

**Thomas J. Kroll**

Thomas J. Kroll Attorney at Law  
Whitefish Bay

**David P. Weller**

Boardman & Clark, LLP  
Madison



## 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.

## Book Sale!

### Wisconsin Probate System: Forms and Procedures Handbook

Save 20% on *Wisconsin Probate System: Forms and Procedures Handbook*.\* Plus, all seminar attendees receive a free two-week trial of the Books UnBound® version. Streamline your probate process with a comprehensive summary of Wisconsin probate law along with the tools to successfully and efficiently probate an estate.

Use discount code **CA3286** when you order online or by calling (800) 728-7788.

**Print Book:** #AK0076; 750+ pp.; 5th ed.; 2018-19 (includes 2020-21 supplement)

**Member:** ~~\$255~~ \$204 | **Nonmember:** ~~\$319~~ \$255.20

**Books UnBound Subscription:** #AE0076\_SUB

**Member:** ~~\$199~~ \$159.20 | **Nonmember:** ~~\$248.75~~ \$199

\*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

### Wispect Update 2021

Experienced practitioners provide insight on the latest trends affecting Special Needs Trusts, the continuing impact of the SECURE Act on retirement assets, Medicare Set Aside Trusts, means-tested benefits for qualified immigrants, and more! **7 CLE**

**Live Webcast:** April 1, 2022

**Webcast Replays:** April 7 | April 13 | April 19 | April 29 | May 2 | May 11 | May 19 | May 24

### Wisconsin Judicial Benchbooks Vol. V: Probate, Guardianship, and Mental Health

When you're preparing a probate, guardianship, or mental health case, you'll want this volume at your side. Written by a committee of experienced judges, this *Benchbook* delivers the essential rules, citations, and judicial commentary in an easy-to-use format. (Includes 2018-19, 2019-20, and 2020-21 supplements)

**Print Book:** #AK0029; 520+ pp.; 5th ed.; 2016-17; **Member:** \$179 | **Nonmember:** \$224

**Books UnBound Subscription:** #AE0029\_SUB; **Member:** \$189 | **Nonmember:** \$236.25

### WisDocs Probate

Take your probate practice to the next level with the enhanced, intuitive, automated document assembly tool *WisDocs Probate*. This technology combines forms and sample language from *Wisconsin Probate System: Forms and Procedures Handbook* with the convenience and speed of HotDocs automation. It's the future of forms!.

**Online Subscription:** #DA0002; **Lawyers Only:** \$299

## Handling a Basic Probate

Priority Code: S 4 0 6 5 B

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<input type="checkbox"/> State Bar Member	<input type="checkbox"/> \$269
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