



# Annual Fiduciary Litigation Update 2022

**Program dates start June 24. Register today!**

**4 CLE**

# Annual Fiduciary Litigation Update 2022

## Duty bound

Your clients know they can rely on you to properly draft their wills and trusts. But what happens when you or your client suspect a violation by someone in a fiduciary role? Are you prepared to take on fiduciary litigation if needed?

With help from the **Annual Fiduciary Litigation Update 2022**, you'll be ready to meet the moment. You'll learn the best ways to avoid adverse outcomes, pick up tested litigation strategies, and get an analysis of the latest developments in fiduciary litigation. You'll come away armed with practical advice and strategies for success.

## How you'll benefit:

- Understand how civil litigation intersects with trusts and estates
- Learn creative strategies for motion practice and litigation
- Review recent developments in fiduciary litigation in Wisconsin and beyond
- Receive tips on how to draft and respond to initial proceedings in trust disputes

## Who should attend:

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

**Register today!**

## Schedule

**8:00 AM Registration**

**8:30 AM Recent Developments in Fiduciary Litigation**

- Wisconsin case law update
- Notable cases in other jurisdictions

**9:20 AM Unique Procedural Rules in Fiduciary Litigation**

- Discussion of various claims that can be brought under the Wisconsin Trust Code, the Probate Code, the Marital Property Act, the Guardianship Statutes, and the Uniform Power of Attorney for Finances and Property Act
- In depth review of how to file claims (petition or summons and complaint), when to file claims (statutes of limitations issues), and where to file (civil court or probate court)
- Understanding critical differences in the discovery process compared to traditional civil litigation

**10:10 AM Break**

**10:25 AM Developing Strategies for Winning Your Case Through Motion Practice**

- Utilizing motions to prohibit trustee fees to level the playing field
- Requesting interim and substitute fiduciaries during litigation
- Motions to compel payments, reimbursements and distributions

**11:15 AM Drafting and Responding to Initial Pleadings**

- Recognizing how the structure of a petition differs from a typical civil complaint
- Incorporating legal arguments and authorities into an initial pleading
- Taking advantage of the full range of remedies into claims for relief
- Identifying critical defenses and structuring objections to petitions to protect the interests of a trustee

**12:05 PM Program Concludes**

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

## Faculty

### Presenters

#### Caitlyn B. Sikorski

Reinhart Boerner Van Deuren, S.C.  
Milwaukee

#### David J. Sisson

Reinhart Boerner Van Deuren, S.C.  
Milwaukee

## Dates Location

### In-Person Seminar – Madison

Friday, June 24, 2022

#### State Bar Center

5302 Eastpark Blvd.,  
Madison, WI  
(608) 257-3838

### Live Webcast

Friday, June 24, 2022

### Webcast Replay

Thursday, June 30, 2022  
Wednesday, July 6, 2022  
Tuesday, July 12, 2022  
Monday, July 18, 2022  
Wednesday, July 27, 2022  
Tuesday, August 2, 2022  
Thursday, August 11, 2022

## Credits

This program will be submitted to the Wisconsin Board of Bar Examiners for **4 CLE credits**. It does not qualify for EPR 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/cancellations](http://wisbar.org/cancellations) 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.

### COVID-19 Safety Information:

Attendees are asked to either be vaccinated or have a negative COVID-19 test administered within 48 hours of the event. Complete and current safety guidelines can be found at [wisbar.org/covidsafety](http://wisbar.org/covidsafety).

## Book Sale!

### Marital Property Law & Practice in Wisconsin

**SAVE 20%** on *Marital Property Law & Practice in Wisconsin*.<sup>\*</sup> Quickly find answers to any questions involving marital property and/or property classification. **Plus, all seminar attendees receive a free two-week trial of the Books UnBound® version.**

Use **discount code CA3309** when you order online at [wisbar.org/AK0067](http://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.*



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## Additional Learning Opportunities

### Death and Dysfunction: Annual Fiduciary Litigation Update 2021

Using real-world case studies, you'll learn how to assess potential claims against agents, trustees, or other fiduciaries. Plus, you'll receive strategies for defending claims against fiduciaries, mitigating risk, and avoiding common missteps along the way. **4 CLE**

**CLE OnDemand:** #CA3052D; **Member:** \$229 | **Nonmember:** \$309

### Wisconsin Probate & Estate Planning Statutes 2022

Find the probate and estate statutes you need in a snap in this book compiled by volunteer attorneys from the State Bar of Wisconsin's Real Property, Probate and Trust Law Section. It's your go-to source for Wisconsin-specific probate and estate planning information.

**Print Book:** #AK0432E22; 580+ pp.; 2022; **Member:** \$75 | **Nonmember:** \$94

### Civil Litigation Forms Library

Notices, complaints, stipulations, jury demands, summons, service of process—the *Civil Litigation Forms Library* has all the forms you need in one place, and accessible from anywhere you have an internet connection. Experience the ease of having the right forms at your fingertips any time you need them.




**Online subscription:** #FSFB3000; **Members Only:** \$149/year  
(Discounts available on multi-user subscriptions.)

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\*Some exclusions may apply.

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## Annual Fiduciary Litigation Update 2022

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### IN-PERSON SEMINAR:

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