



43rd Annual Estate Planning Update

Program dates start November 18. Register today!

7 CLE

43rd Annual Estate Planning Update

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

Got plans?

Whether you have questions about the Corporate Transparency Act's impact on your clients' estate plans or how best to administer ongoing trusts, you'll find answers at the *43rd Annual Estate Planning Update*. You'll learn current estate planning best practices and techniques from top-notch practitioners. Attorneys of all experience levels will benefit from discussions on recent developments in state and federal case law and legislation, as well as insights on proposed changes to the Wisconsin Trust Code.

How you'll benefit:

- Understand how the Corporate Transparency Act will impact family limited partnerships and LLCs
- Get the latest guidance on Social Security and Medicare benefits
- Find out when and how to use a grantor trust
- Pick up helpful tips and practical insight from experienced practitioners
- Receive important case law and legislative updates from the past year

Who should attend:

- Estate planning practitioners
- Probate attorneys
- Elder law attorneys
- General practitioners
- Attorneys advising small businesses

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.

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. For in-person seminars, walk-in registrations using Passbook Certificates are also welcome.

Registration Cancellations: Please visit 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 up to two days prior to and 90 days after your seminar.

COVID-19 safety information: Complete and current safety guidelines can be found at wisbar.org/covidsafety.

This program is sponsored by:

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Schedule

8:00 AM Registration

8:30 AM Recent Developments in Estate Planning

- Federal case law
- Federal legislation
- Wisconsin case law
- Wisconsin legislation

Joseph M. Higgins, H. Wes Taylor

9:45 AM Break

10:00 AM Red Alert!!! The Corporate Transparency Act Is Coming

- A trap for the unwary estate planner
- Big impact for closely held entities
- Report requirements
- Significant penalties for noncompliance
- Effective soon – prepare now

Randy S. Nelson

10:50 AM Advising the Trustee

- How to advise the trustee on declining or accepting trusteeship
- What happens if there is no trustee or trustee wishes to resign
- What is the trustee accountable to?

Ashley L. Hawley, Melissa S. Kampmann

11:45 AM Lunch (on your own)

1:00 PM Irrevocable Trust Planning with Grantor Trusts

- The benefits of Grantor Trusts
- Commonly used provisions to create a Grantor Trust
- Common traps to avoid if your client does not wish to create a Grantor Trust
- What to do if your client decides Grantor Trust tax status is no longer desired
- Treating someone other than the Settlor as the grantor for tax purposes

Jennifer M. Olk

1:50 PM Trust Code Trailer Bill

- Proposed changes and additions to the Wisconsin Trust Code
- The status of the bill and potential impacts

Victor J. Schultz

2:40 PM Break

2:55 PM What Every Estate Planner Should Know About Social Security and Medicare

- Social Security basics – eligibility, calculation of benefits, adjunct benefits, offsets
- Medicare basics – the four parts of Medicare, eligibility, coordination with Social Security
- What the future may hold for these benefits

Ruthann M. Driscoll

4:10 PM Program Concludes

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

Dates

Location

In-Person Seminar

Friday, November 18, 2022
State Bar Center
5302 Eastpark Blvd.,
Madison, WI
(608) 257-3838

Live Webcast

Friday, November 18, 2022

Webcast Replays

Thursday, November 24, 2022
Wednesday, November 30, 2022
Tuesday, December 6, 2022
Saturday, December 10, 2022
Monday, December 12, 2022
Thursday, December 22, 2022
Tuesday, December 27, 2022
Friday, January 6, 2023

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

Credits

This program will be submitted to the Wisconsin Board of Bar Examiners for **7 CLE credits**. It does not qualify for EPR credit.

Faculty

Program Chairs & Presenters

Melissa S. Kampmann

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

Randy S. Nelson

von Briesen & Roper, S.C.
Milwaukee

Presenters

Ruthann M. Driscoll

Driscoll Law LLC
Wauwatosa

Ashley L. Hawley

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

Joseph M. Higgins

Foley & Lardner LLP
Madison

Jennifer M. Olk

Husch Blackwell LLP
Milwaukee

Victor J. Schultz

Prairie Trust
A Division of Waukesha State Bank
Oconomowoc

H. Wes Taylor

Foley & Lardner LLP
Madison

Book Bonus!

Eckhardt's Workbook for Wisconsin Estate Planners

Seminar attendees will enjoy a **free two-week trial** of the *Eckhardt's Workbook for Wisconsin Estate Planners* Books UnBound® title and an invitation to **save 20%** on either a one-year subscription to the Books UnBound title or purchase of the print book.* This best-selling classic is a one-stop reference with a practical, how-to approach that demystifies the complexities of estate planning.



*Attendees will receive information to access the free trial and discount via email after attending the program. 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

Legacy Planning for the Family Property 2022

Help clients prevent their beloved family vacation homes from causing family arguments. Learn to create a framework for future use, ownership, and management of family properties and give your clients peace of mind about the future. **1 CLE**

Webcast Replays: Nov. 15, 2022 | Dec. 9, 2022

Marital Property Law & Practice in Wisconsin

Marital Property Law & Practice in Wisconsin is a practice-ready, user-friendly reference that offers quick answers to any question involving marital property or property classification. It includes practice aids like sample forms, charts, and flowcharts that will help you draft marital property agreements correctly.

Print Book: #AK0067; 860+ pp.; 5th ed. 2018-19; **Member:** \$313 | **Nonmember:** \$390

Books UnBound Subscription: #AE0067_SUB; **Member:** \$309 | **Nonmember:** \$383

WisDocs Estate Planning — Document Assembly System

WisDocs Estate Planning is a document assembly system compiled from dozens of forms and sample language provisions from the award-winning *Eckhardt's Workbook for Wisconsin Estate Planners*. It's a powerful, user-friendly system accessible wherever you have an internet connection.

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

NOTICE: By attending this State Bar event, you understand and agree that you may be photographed and/or electronically recorded during the event and you hereby grant to the State Bar the right to use and distribute your name and likeness for promotional or educational purposes without monetary compensation. The State Bar assumes no liability for such use.

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Priority Code: S 4164B

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<input type="checkbox"/> State Bar Member	<input type="checkbox"/> \$239	<input type="checkbox"/> \$269
<input type="checkbox"/> Nonmember	<input type="checkbox"/> \$319	<input type="checkbox"/> \$349
<input type="checkbox"/> Ultimate Pass Gold/Silver	<input type="checkbox"/> \$0	<input type="checkbox"/> \$0
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<input type="checkbox"/> Passbook Certificate	<input type="checkbox"/> 1 Certificate	<input type="checkbox"/> 1 Certificate

IN-PERSON SEMINAR:

Friday, Nov. 18, 2022 –
Madison

LIVE WEBCAST:

Friday, Nov. 18, 2022

WEBCAST REPLAYS:

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 Friday, Jan. 6, 2023

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*The \$50 Real Property, Probate and Trust Law (RPPT) Section discount applies only to the in-person and webcast presentations of this seminar – not CLE OnDemand. RPPT members with Ultimate Passes, other CLE passes, or PINNACLE discounts are not eligible for this discount. The RPPT Section may discontinue this discount at any time.

Mail to: State Bar PINNACLE Registrations
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Madison, WI 53707-7158

Event Code: CA3321MWR R2 R3 R4 R5 R6 R7 R8