



44th Annual Estate Planning Update

Program dates start November 10. Register today!

**7.5 CLE
1 EPR**

44th Annual Estate Planning Update

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

Planning preparedness

Whether you have questions about how the SECURE Act 2.0 impacts retirement beneficiary designations or life insurance provisions in buy-sell agreements, you'll find answers and insights at the **44th Annual Estate Planning Update**. Top-notch practitioners will offer planning best practices to attorneys of all experience levels and discuss the impact of recent developments in state and federal legislation and case law.

How you'll benefit:

- Hear recommendations for structuring buy-sell agreements to avoid unintentional tax burdens
- Develop sound strategies for higher education funding
- Discover tips, tricks, and pitfalls for retirement beneficiary designations every estate planner should know
- Understand the process for modifying charitable trusts
- Review strategies for making charitable gifts with appreciated property
- Recognize and avoid missteps in post-death administrations

Who should attend:

- Estate planning lawyers
- Probate attorneys
- Attorneys advising small businesses
- General practitioners

Register now!

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

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

Registration

ONLINE: 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:



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 The New Connelly Trap for Insured Buy-Sell Agreements

- Designing buy-sell agreements
 - Fixing the estate tax value of the business
 - *Connelly v. US* (8th Cir. 2023)
 - Using a life insurance LLC
- Randy S. Nelson*

10:55 AM Modifying Charitable Trusts

- What is a charitable trust?
 - What is the process to modify a charitable trust?
 - What is the role for the attorney general?
- Melissa S. Kampmann*

11:45 AM Lunch (on your own)

1:00 PM Education Funding Strategies

- A bird's eye view of higher education funding
 - General strategies for education funding
 - Gift tax considerations
 - 529 Plans & Secure Act 2.0
 - Using education trusts
- George S. Peek*

1:50 PM Charitable Gifts with Appreciated Property

- Income tax planning around sale event
 - Assignment of income doctrine
 - Qualified appraisal requirements
- Jason J. Kohout*

2:40 PM Break

2:55 PM Estate Planning Considerations for Retirement Beneficiary Designations in Light of the SECURE Acts

- Overview of the Required Minimum Distribution (RMD) rules
 - Spousal rollovers
 - Naming a trust as beneficiary
 - Tips, tricks and pitfalls every planner should know
- Jeffrey S. Billings*

3:45 PM Ethical Issues Confronting Attorneys in Post-Death Administrations

- What are the problems with applying the rules of professional conduct to trusts and estates practitioners?
 - What are the sources of law and resources available to an attorney?
 - Which people are entitled to information about the deceased client's plan?
 - Who is the client, and to whom do the attorney's duty flow?
 - What are the best practices when communicating with beneficiaries?
 - What are common conflicts of interest in post-death administrations, and how should they be dealt with?
- Peter J. Wyant*

4:35 PM Program Concludes

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

Dates Location

In-Person Seminar

Friday, November 10, 2023
State Bar Center
5302 Eastpark Blvd.,
Madison, WI
(608) 257-3838

Live Webcast

Friday, November 10, 2023

Webcast Replays

Tuesday, November 21, 2023
Wednesday, November 29, 2023
Tuesday, December 5, 2023
Saturday, December 9, 2023
Monday, December 11, 2023
Thursday, December 21, 2023
Tuesday, December 26, 2023
Friday, January 5, 2024
Wednesday, January 10, 2024

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

Faculty

Program Chairs & Presenters

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

Randy S. Nelson
von Briesen & Roper, S.C.
Milwaukee

Presenters

Jeffrey S. Billings
Godfrey & Kahn, S.C.
Milwaukee

Joseph M. Higgins
Foley & Lardner LLP
Madison

Jason J. Kohout
Foley & Lardner LLP
Milwaukee

George S. Peek
von Briesen & Roper, S.C.
Milwaukee

H. Wes Taylor
Foley & Lardner LLP
Madison

Peter J. Wyant
Wyant Law Offices, S.C.
Racine

Credits

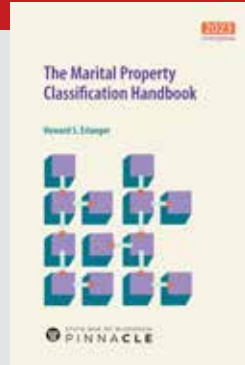
This program will be submitted to the Wisconsin Board of Bar Examiners for **7.5 CLE credits including 1 Ethics and Professional Responsibility credit.**

Book Bonus!

The Marital Property Classification Handbook

Seminar attendees **SAVE 15%** on *The Marital Property Classification Handbook*.* Take the guesswork out of marital property matters with the *Handbook's* simple five-step property classification system.

*Attendees will receive information to access the 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

Top Ten Mistakes Made with Beneficiary Designations 2023

Learn to spot and avoid common beneficiary designation mishaps that lead to family disputes or tax consequences. Understand how to title assets to avoid probate and recognize when probate may be your best option. **1 CLE**

Webcast Replays: Oct. 23, 2023 | Oct. 28, 2023 | Nov. 3, 2023 | Nov. 7, 2023
Nov. 15, 2023 | Dec. 4, 2023 | Dec. 19, 2023 | Jan. 25, 2024

Eckhardt's Workbook for Wisconsin Estate Planners

This best-selling classic is a one-stop reference book with a practical, how-to approach to estate planning. Checklists, examples, tables, charts, and diagrams simplify and illuminate the topical discussions and annotated sample forms show how general principles can be applied in practice. (Includes 2020-21 and 2021-22 supplements)

Print Book: #AK0047; 930+ pp.; 7th ed. 2018-19; **Member:** \$313.20 | **Nonmember:** \$391.50
Books UnBound Subscription: #AE0047_SUB; **Member:** \$307 | **Nonmember:** \$383

WisDocs Estate Planning

Compiled from forms and sample-language provisions from the award-winning *Eckhardt's Workbook for Wisconsin Estate Planners*, this document assembly system creates automated, expertly crafted forms templates. Just select the type of form you want to create, complete a guided interview, and you'll have a customized document in one click.

Document Assembly System: #DA0001 | **Lawyers only:** \$39/month

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Priority Code: **S 4 2 6 7 B**

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<input type="checkbox"/> Passbook Certificate	<input type="checkbox"/> 1 Certificate	<input type="checkbox"/> 1 Certificate

IN-PERSON SEMINAR:

Friday, Nov. 10, 2023 –
Madison

LIVE WEBCAST:

Friday, Nov. 10, 2023

WEBCAST REPLAYS:

Tues., Nov. 21, 2023

Weds., Nov. 29, 2023

Tues., Dec. 5, 2023

Sat., Dec. 9, 2023

Mon., Dec. 11, 2023

Thurs., Dec. 21, 2023

Tues., Dec. 26, 2023

Fri., Jan. 5, 2024

Weds., Jan. 10, 2024

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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.

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