STATE BAR OF WISCONSIN
PINNACLE
Your Practice. Our Purpose.

Step-by-Step Estate Planning I

and

Step-by-Step Estate Planning II

Program dates start January 24. Register today!

Estate Planning I
7.5 CLE | 1 EPR

Estate Planning II
6. 5 CLE

Step-by-Step Estate Planning I

and

Step-by-Step Estate Planning II

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 review, or want to expand your skills, the ***Build Your Practice Estate Planning Series*** has something for you.

RPPT Section members SAVE $50 and YLD members SAVE $20 on tuition for these programs!

Who should attend:

- New attorneys seeking to establish an area of practice
- Established attorneys new to estate planning
- Experienced estate planners seeking a refresher
- Elder law practitioners
- General practitioners

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

How you'll benefit:

- Familiarize yourself with the core concepts of estate planning
- Receive an introduction to estate and gift taxes
- Explore different types of trusts and how to use them in planning
- Understand powers of attorney and health care advance directives
- Learn how marital property agreements can impact estate plans
- Identify and avoid potential ethical pitfalls in estate planning practice

Step-by-Step Estate Planning II covers more advanced concepts and planning strategies for more complicated estates.

How you'll benefit:

- Learn how to draft in compliance with federal and Wisconsin estate taxes
- Understand the rules of retirement benefits and IRAs
- Explore gifting techniques using trusts
- Discover planning strategies for second marriages, blended families, and unmarried couples
- Gain clarity on generation-skipping transfer taxes
- Find out how to use family limited partnerships and LLCs

Register now!

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 *my*StateBar 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**.

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.)

RPPT Section members save $50

Real Property, Probate and Trust Law Section members receive $50 off tuition for the in-person, live webcast, and webcast replay presentations of these seminars. 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.

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.

BUILD YOUR PRACTICE

Step-by-Step Estate Planning I

Take the first step in starting your estate planning practice!

Schedule

8:00 AM **Registration**

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
- Working with the marital deduction and federal exemption

Philip J. Miller

10:30 AM **Break**

10:45 AM **An Introduction to Tax Issues in Estate Planning (continued)**
- Reducing taxable estates through lifetime giving
- 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 (on your own)**

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
- Conflict of interest
- Clients with diminished capacity
- Competence
- Confidentiality

Amy J. Krier, 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

Amy J. Krier
Certus Legal Group, Ltd.
Milwaukee

Philip J. Miller
Husch Blackwell LLP
Milwaukee

Catherine M. Priebe
Certus Legal Group, Ltd.
Milwaukee

Credits

Step-by-Step Estate Planning I will be submitted to the Wisconsin Board of Bar Examiners for **7.5 CLE credits including 1 ethics and professional responsibility credit**.

Dates Location

In-Person Seminar – Madison

Wednesday, January 24, 2024
State Bar Center
5302 Eastpark Blvd.
Madison, WI
(608) 257-3838

Live Webcast

Wednesday, January 24, 2024

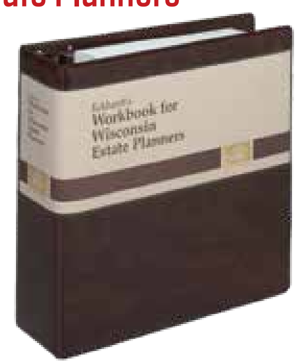
Webcast Replay

Wednesday, January 31, 2024
Tuesday, February 6, 2024
Monday, February 12, 2024
Friday, February 16, 2024
Thursday, February 22, 2024
Wednesday, February 28, 2024
Monday, March 4, 2024
Tuesday, March 20, 2024

Book Bonus!

Eckardt's Workbook for Wisconsin Estate Planners

Seminar attendees **SAVE 15%** on *Eckhardt's Workbook for Wisconsin Estate Planners.** This best-seller features decades of expertise from some of Wisconsin's most respected estate planning attorneys.



**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.*

Step-by-Step Estate Planning II

Take your estate planning skills to the next level!

Schedule

8:00 AM **Registration**

8:30 AM **Drafting for Tax Issues**
- Overview of federal and Wisconsin estate taxes
- Marital deduction and portability
- Unified credit
- Formula clauses
- Powers of appointment
- Basis step-up issues
- Drafting with flexibility for the changing federal exclusion amount

Bradley J. Kalscheur

9:30 AM **Planning for Retirement Benefits and IRAs**
- Rules when death occurs before required beginning date
- Rules when death occurs after required beginning date
- Spouse vs. non-spouse beneficiary
- Trust as beneficiary
- Planning for a "stretch payout"

Philip J. Miller

10:15 AM **Break**

10:30 AM **Gifting Techniques Using Trusts**
- Objective of gifting in trust
- Advantages and disadvantages of trusts vs. outright gifts
- Planning for the annual exclusion
- Insurance trusts
- Grantor retained interest trusts
- Spousal Limited Access Trusts (SLATs)
- The growing importance of income tax planning for trusts

Ann M. Rieger

11:15 AM **Mine, Yours, and Ours: Planning for Second Marriages and Blended Families**
- Planning with prenuptial and marital property agreements
- Use of exemptions and exclusions
- Trusts and other estate planning documents
- Planning for unmarried persons and couples
- Gifting strategies

Bradley J. Kalscheur

12:00 PM **Lunch (on your own)**

1:00 PM **Generation-Skipping Transfer Tax Planning**
- Allocation of generation-skipping transfer tax exemption
- Drafting ideas
- Dynasty trusts

Philip J. Miller

2:10 PM **Break**

2:25 PM **Use of Family Limited Partnerships/LLCs**
- General concepts
- Discount planning
- Control issues
- Cash flow issues
- Income tax issues
- Use for family vacation home

Ann M. Rieger

3:30 PM **Program Concludes**

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

Faculty

Bradley J. Kalscheur
Michael Best & Friedrich LLP
Milwaukee

Philip J. Miller
Husch Blackwell LLP
Milwaukee

Ann M. Rieger
Amundsen Davis LLC
Brookfield

Credits

Step-by-Step Estate Planning II will be submitted to the Wisconsin Board of Bar Examiners for **6.5 CLE credits**. It does not qualify for EPR credit.

Dates | Location

In-Person Seminar – Madison

Wednesday, February 28, 2024
State Bar Center
5302 Eastpark Blvd.
Madison, WI
(608) 257-3838

Live Webcast

Wednesday, February 28, 2024

Webcast Replay

Thursday, March 7, 2024
Tuesday, March 12, 2024
Monday, March 18, 2024
Friday, March 22, 2024
Thursday, March 28, 2024
Monday, April 8, 2024
Wednesday, April 17, 2024

Additional Learning Opportunities

CLE OnDemand™

Drafting Your First Will or Trust

Enhance your understanding of fundamental estate planning concepts and learn how to draft a valid, enforceable will from start to finish. Receive a complete overview of the provisions in basic wills and trusts and come away with the skills you need to offer estate planning services to your clients. **2 CLE**

CLE OnDemand: #CA3544D **Member:** $149 | **Nonmember:** $199

Books / Books UnBound®

Wisconsin Probate System: Forms and Procedures Handbook

Get the guidance you need to probate an estate accurately and efficiently with this comprehensive summary of Wisconsin probate laws. It also includes sample forms, letters, checklists, and hypothetical scenarios to help you understand the laws as applied to different facts. (Includes 2020-21 and 2022-23 supplements)

Print Book: #AK0076; 750+ pp.; 5th ed. 2018-19; **Member:** $275 | **Nonmember:** $343.75
Books UnBound Subscription: #AE0076_SUB; **Member:** $249 | **Nonmember:** $311

WisDocs Document Assembly System

WisDocs Estate Planning

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. Gain access to expertly crafted forms templates that are automated using HotDocs technology.

Online Subscription: #DA0001; **Lawyers Only:** $39/month

These programs are sponsored by:

Bank of Sun Prairie — The Right Balance.
Wisconsin Lawyers Mutual Insurance Company — WILMIC
Bultman Financial
Wispact
Prairie Trust — Specialized Expertise. Strategic Partnerships.

Step-by-Step Estate Planning I & II

Priority Code: S 4 3 3 5 B

SEMINAR TUITION (For each full-day program)	IN-PERSON SEMINAR	WEBCAST SEMINAR
☐ State Bar Member	☐ $239	☐ $269
☐ Nonmember	☐ $319	☐ $349
☐ RPPT Section Member*	☐ $189	☐ $219
☐ YLD Section Member**	☐ $219	☐ $249
☐ Ultimate Pass Gold/Silver	☐ $0	☐ $0
☐ Ultimate Pass Bronze	☐ $239	☐ $0
☐ Passbook Certificate	☐ 1 Certificate	☐ 1 Certificate

I will attend the following seminar(s):

Step-by-Step Estate Planning I
☐ **In-Person Seminar:** Weds., Jan. 24, 2024 | Madison
☐ **Live Webcast:** Weds., Jan. 24, 2024
☐ **Webcast Replay:** ______________________ (Date you will attend)

Step-by-Step Estate Planning II
☐ **In-Person Seminar:** Weds., Feb. 28, 2024 | Madison
☐ **Live Webcast:** Weds., Feb. 28, 2024
☐ **Webcast Replay:** ______________________ (Date you will attend)

☐ Lawyer State Bar Member No. ______________________
☐ Nonlawyer Profession ______________________
Name ______________________
Firm Name ______________________
Address ______________________
City/State/Zip ______________________
Phone Number ______________________
Email ______________________

PAYMENT: Tuition Amount Enclosed $__________
☐ State Bar Passbook Certificate (enter certificate number) # __________________
☐ Check enclosed (payable to State Bar PINNACLE) __________________
☐ Ultimate Pass Gold ☐ Ultimate Pass Silver ☐ Ultimate Pass Bronze
☐ VISA ☐ MasterCard ☐ American Express ☐ Discover Exp. Date ______________
Card No. ______________________
Signature ______________________

***The $50 Real Property, Probate and Trust Law (RPPT) Section discount** applies only to the in-person and webcast presentations of these seminars – 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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Mail to: State Bar PINNACLE Registrations
P.O. Box 7158
Madison, WI 53707-7158

EP1: CA3591W R R2 R3 R4 R5 R6 R7 R8
EP2: CA3592W R R2 R3 R4 R5 R6 R7