



STATE BAR  
OF WISCONSIN

P.O. Box 7158, Madison, WI 53707-7158

## 45th Annual Estate Planning Update

**CREDIT HOURS:** 7.5 CLE credits including 1 EPR credit

**IN-PERSON SEMINAR:** Friday, November 8, 2024 – Madison

**LIVE WEBCAST:** Friday, November 8, 2024

**WEBCAST REPLAYS:** Monday, November 18, 2024  
Friday, November 22, 2024  
Wednesday, November 27, 2024  
Thursday, December 5, 2024  
Wednesday, December 11, 2024  
Tuesday, December 17, 2024  
Saturday, December 21, 2024  
Thursday, December 26, 2024  
Friday, January 3, 2025  
Wednesday, January 8, 2025  
Monday, January 20, 2025  
Thursday, January 30, 2025

STATE BAR OF WISCONSIN  
PINNACLE

# 45th Annual Estate Planning Update



7.5 CLE | 1 EPR

Program dates start November 8.  
Register today!

# 45th Annual Estate Planning Update



**Endorsed by the Real Property, Probate and Trust Law Section of the State Bar of Wisconsin**

## With a will, there's a way

The **45th Annual Estate Planning Update** arms you with the latest strategies to protect your clients' interests and preserve their wishes. Experienced practitioners will guide you through recent developments in state and federal legislation, as well as key case law updates, and offer insights on trending topics. You'll also examine how a recent U.S. Supreme Court ruling impacts estate tax obligations and business valuations and learn how it may affect your clients moving forward.

### HOW YOU'LL BENEFIT

- Delve into hot topics including modifying irrevocable trusts, credit protection, and more
- Explore the implications of the Supreme Court's decision in *Connelly v. U.S.*
- Receive sample language and forms you can use in your estate planning practice
- Review the nuts and bolts of trust terminations and how to use them
- Analyze ethical issues confronting trust and estate lawyers before a client's death

Help your clients avoid probate problems with the tools and information you'll find at the **45th Annual Estate Planning Update**. **Register today!**

## DATES & LOCATION

### IN-PERSON SEMINAR — MADISON

Friday, November 8, 2024  
**State Bar Center**  
5302 Eastpark Blvd., Madison, WI  
(608) 257-3838

### LIVE WEBCAST

Friday, November 8, 2024

### WEBCAST REPLAYS

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## PROGRAM SPONSORS



**Real Property, Probate and Trust Law Section members SAVE \$50 on tuition for this program!**

See tuition chart in this brochure for complete details about this offer.

**NOT A SECTION MEMBER?** Join today to save on tuition to the in-person or webcast versions of this program and to gain access to additional valuable section resources and benefits. Visit [wisbar.org/sections](https://www.wisbar.org/sections) to join.

# SCHEDULE

**8:00 AM Registration**

**8:30 AM Welcome and Introductions**

**8:35 AM Ethical Issues Confronting Trust & Estate Attorneys Before Their Clients Die**

- How to structure the representation of married clients
- Conflicts of interest in blended families
- Ethical concerns when planning for nursing home expenses
- Conflicts of interest for owners of closely held businesses
- Conflicts of interest when representing multiple generations of a family

*Dayna J. Lefebvre, Peter J. Wyant*

**9:25 AM Connelly v. United States**

*Randy S. Nelson*

**10:15 AM Break**

**10:30 AM Creditor Protection in Estate Planning**

*Melissa S. Kampmann*

**11:20 AM Unraveling Representation**

- Unpacking the power of representation: key concepts and real-world impact
- Mastering representation: practical strategies for maximizing impact
- Navigating the complexities: apply representation statutes to unique scenarios

*Jamie B. Barwin*

**12:10 PM Lunch (on your own)**

**1:10 PM Trust Termination**

*Victor J. Schultz*

**2:00 PM Fixing a Broken Trust: Irrevocable Trust Modifications**

- Options for modifying irrevocable trusts under the Wisconsin Trust Code
- Practical pointers and discussion of logistics for accomplishing such modifications
- Discussion of when to use one mechanism over the other and traps to avoid

*Kelly Dancy*

**2:50 PM Break**

**3:05 PM Recent Developments in Estate Planning**

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

*Joseph M. Higgins, Kass Longie*

**4:30 PM Program Concludes**

*Following start time, schedule will vary slightly from above. All times are Central Time Zone.*

## FACULTY

### PROGRAM CHAIRS & PRESENTERS

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

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

### PRESENTERS

**Jamie B. Barwin**, von Briesen & Roper, S.C., Milwaukee

**Kelly Dancy**, Walny Legal Group LLC, Milwaukee

**Joseph M. Higgins**, Foley & Lardner LLP, Madison

**Dayna J. Lefebvre**, Becker, Hickey & Poster, S.C., Milwaukee

**Kass Longie**, Foley & Lardner LLP, Madison

**Victor J. Schultz**, Prairie Trust a Division of Waukesha State Bank, Oconomowoc

**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.**

**Anytime. Anywhere. CLE OnDemand.™**  
[wisbar.org/ondemand](http://wisbar.org/ondemand)

## TUITION

	IN-PERSON	WEBCAST
State Bar Member	\$249	\$279
Nonmember	\$329	\$359
RPPT Section Member*	\$199	\$229
Ultimate Pass Gold/Silver	\$0	\$0
Ultimate Pass Bronze	\$249	\$0
Passbook Certificate	1 Certificate	1 Certificate

\*The **Real Property, Probate and Trust Law (RPPT) Section** \$50 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.

## REGISTRATION & GENERAL INFO

**ONLINE:** [wisbar.org/seminars](https://wisbar.org/seminars)  
**PHONE:** (800) 728-7788  
**MAIL/FAX:** Visit [wisbar.org/regform](https://wisbar.org/regform)  
for registration form



**PINNACLE PASSBOOK REGISTRATIONS:** PINNACLE 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.

**COURSE MATERIALS:** Course materials are provided to seminar attendees in PDF format and are downloadable from myStateBar on [wisbar.org](https://wisbar.org) up to two days prior to and 90 days after your seminar.

**CANCELLATIONS:** Please visit [wisbar.org/cancellations](https://wisbar.org/cancellations) for information on PINNACLE registration cancellation policies.

**ACCOMMODATIONS:** PINNACLE is committed to making it's CLE events accessible to everyone. If you have a disability and need an accommodation to attend this program, please complete the accommodations request form at [wisbar.org/needsrequest](https://wisbar.org/needsrequest).

**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.

Event Code: CA3689 Priority Code: S4430B

## BOOK BONUS!

### Eckhardt's Workbook for Wisconsin Estate Planners

**SAVE 15%** on *Eckhardt's Workbook for Wisconsin Estate Planners*.\* This best seller is your source for mastering the increasingly complex subject of estate planning. Use **discount code CA3689** when you order online or by calling (800) 728-7788.

**PRINT BOOK:** AK0047 **BOOKS UNBOUND:** AE0047\_SUB

\*Discount applies to both print and digital Books Unbound editions of this title and cannot be applied to previous purchases. Offer valid through 12/31/25. For Books Unbound users, discount may be applied to purchase of individual Books Unbound title only and may not be used on the purchase of libraries. Discount cannot be combined with any other offers.



## ADDITIONAL LEARNING OPPORTUNITIES

### Legacy Planning for the Family Property 2024

Don't let your client's family property turn into a family argument. Learn how to create effective succession plans for the future of family properties and establish a foundation for future ownership and management of the property. **1 CLE**

**WEBCAST REPLAYS:** OCT. 9, 2024 | OCT. 17, 2024 | OCT. 25, 2024 | OCT. 29, 2024  
NOV. 5, 2024 | NOV. 13, 2024 | NOV. 21, 2024 | DEC. 6, 2024

### Wisconsin Trust Code and Powers of Appointment Act

The Trust Code Trailer Bill has arrived, with substantial changes to trust administration, decanting, powers of appointment, and more. Put the latest version of the Wisconsin Trust Code at your fingertips, including the recent changes, with this new resource.

**PRINT BOOK:** AK0418E25

### Estate Planning/Probate Forms Library

Put high-quality estate planning and probate law at your fingertips with a subscription to the *Estate Planning/Probate Forms Library*. It's filled with practice templates you can modify and adapt to your needs, including motions, notices, marital property agreements, powers of attorney, and more!

**MEMBERS ONLY – ONLINE SUBSCRIPTION:** FSFB7000