



STATE BAR
OF WISCONSIN

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

Step-by-Step Estate Planning I

7.5 CLE/1 EPR Credits

Program dates start January 29, 2025

Step-by-Step Estate Planning II

6.5 CLE Credits

Program dates start February 27, 2025



STATE BAR OF WISCONSIN

PINNACLE

Step-by-Step Estate Planning I

and

Step-by-Step Estate Planning II



Program dates start January 29.
Register today!

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

Plan like a pro

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.

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!

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

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.



ADDITIONAL LEARNING OPPORTUNITIES

45th Annual Estate Planning Update 2024

Delve into hot topics in estate planning, including modifying irrevocable trusts, credit protection, and the implications of *Connelly v. U.S.* Review the ins and outs of trust terminations and receive sample language and forms you can use in your practice.



CREDITS: 7.5 CLE / 1 EPR

WEBCAST REPLAY: DEC. 21, 2024 | DEC. 26, 2024 | JAN. 3, 2025 | JAN. 8, 2025 | JAN. 20, 2025 | JAN. 30, 2025



Books Unbound Library Collection: Estate, Probate, and Elder Law

Gain access to a wide range of essential PINNACLE® Books titles in one online library. Ideal for both seasoned attorneys and those seeking a refresher, this resource is designed to help you tackle estate planning, probate, and elder law issues effectively and efficiently.

ONLINE SUBSCRIPTION: AL0006_SUB

Estate Planning & Probate Forms Library

Complete estate and probate transactions faster and more accurately with access to over 300 documents, including motions, notices, marital property agreements, powers of attorney, and more. Plus, all documents are customizable and updated to comply with statutory requirements.



MEMBERS ONLY – ONLINE SUBSCRIPTION: FSFB7000

SCHEDULE

<p>8:00 AM Registration</p>	<p>1:00 PM Additional Core Estate Planning Documents</p> <ul style="list-style-type: none"> • Durable Powers of Attorney for Finances and Property • Powers of Attorney for Health Care • Authorizations for Disclosure of Health Information • Authorizations for Final Disposition • Directions for Non-Probate Transfers on Death <i>Shanna N. Yonke</i>
<p>8:30 AM Drafting a Basic Will</p> <ul style="list-style-type: none"> • 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 <i>Peter J. Wyant</i> 	<p>1:45 PM Marital Property Agreements in Estate Planning</p> <ul style="list-style-type: none"> • 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 <i>Amy J. Krier</i>
<p>9:30 AM An Introduction to Tax Issues in Estate Planning</p> <ul style="list-style-type: none"> • Overview of the Federal Estate Tax • Overview of the Federal Gift Tax • Working with the marital deduction and federal exemption • Reducing taxable estates through lifetime giving • Generation-skipping transfer tax and other issues <i>Shanna N. Yonke</i> 	
<p>10:30 AM Break</p>	<p>2:45 PM Break</p>
<p>10:45 AM General Uses of Trusts in Estate Planning</p> <ul style="list-style-type: none"> • Testamentary vs. living trusts • Revocable vs. irrevocable trusts • Common uses of trusts • Probate avoidance • Grantor vs. non-grantor trusts for income tax purposes • Special trusts • Trust modification/ termination and use of nonjudicial settlement agreements <i>Amy J. Krier</i> 	<p>3:00 PM Ethical Issues Faced by the Estate Planning Practitioner</p> <ul style="list-style-type: none"> • Identifying your client • Joint representation of spouses • Conflict of interest • Clients with diminished capacity • Competence • Confidentiality <i>Peter J. Wyant</i>
<p>12:00 PM Lunch (on your own)</p>	<p>4:00 PM Question & Answer</p> <p>4:15 PM Program Concludes</p> <p><i>Following program start time, schedule may vary slightly from above listed times. All times are Central Time Zone.</i></p>

FACULTY

- Amy J. Krier**
Certus Legal Group, Ltd.
Milwaukee
- Peter J. Wyant**
Wyant Law Offices, S.C.
Racine
- Shanna N. Yonke**
Ruder Ware, L.L.S.C.
Wausau

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 29, 2025
State Bar Center
5302 Eastpark Blvd., Madison, WI
- Live Webcast**
Wednesday, January 29, 2025
- Webcast Replay**
Thursday, February 6, 2025
Tuesday, February 11, 2025
Monday, February 17, 2025
Saturday, February 22, 2025
Friday, February 28, 2025
Wednesday, March 12, 2025
Tuesday, March 18, 2025
Thursday, March 27, 2025
Thursday, April 17, 2025
Friday, May 16, 2025
Wednesday, September 17, 2025
Monday, October 13, 2025

BOOK BONUS!

Eckardt's Workbook for Wisconsin Estate Planners

SAVE 15% on *Eckardt's Workbook for Wisconsin Estate Planners*.* This best-seller features decades of expertise from some of Wisconsin's most respected estate planning lawyers. **Use discount code CA3751** when you order online or by calling (800) 728-7788.

*Discount applies to both print and digital Books Unbound editions of this title and cannot be applied to previous purchases. Offer valid through 12/31/26. 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.



SCHEDULE

<p>8:00 AM Registration</p>		<p>11:15 AM Mine, Yours, and Ours: Planning for Second Marriages and Blended Families</p> <ul style="list-style-type: none"> • 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 <p><i>Bradley J. Kalscheur</i></p>
<p>8:30 AM Drafting for Tax Issues</p> <ul style="list-style-type: none"> • 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 <p><i>Bradley J. Kalscheur</i></p>		<p>12:00 PM Lunch (on your own)</p>
<p>9:30 AM Planning for Retirement Benefits and IRAs</p> <ul style="list-style-type: none"> • 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” <p><i>Philip J. Miller</i></p>		<p>1:00 PM Generation-Skipping Transfer Tax Planning</p> <ul style="list-style-type: none"> • Allocation of generation-skipping transfer tax exemption • Drafting ideas • Dynasty trusts <p><i>Philip J. Miller</i></p>
<p>10:15 AM Break</p>		<p>2:10 PM Break</p>
<p>10:30 AM Gifting Techniques Using Trusts</p> <ul style="list-style-type: none"> • 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 <p><i>Ann M. Rieger</i></p>		<p>2:25 PM Use of Family Limited Partnerships/LLCs</p> <ul style="list-style-type: none"> • General concepts • Discount planning • Control issues • Cash flow issues • Income tax issues • Use for family vacation home <p><i>Ann M. Rieger</i></p>
		<p>3:30 PM Program Concludes</p>

Following program start time, schedule may vary slightly from above listed times. All times are Central Time Zone.

FACULTY

- Bradley J. Kalscheur**
Michael Best & Friedrich LLP
Milwaukee
- Philip J. Miller**
Husch Blackwell LLP
Waukesha
- 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**
Thursday, February 27, 2025
State Bar Center
5302 Eastpark Blvd., Madison, WI
- Live Webcast**
Thursday, February 27, 2025
- Webcast Replay**
Friday, March 7, 2025
Thursday, March 13, 2025
Tuesday, March 18, 2025
Monday, March 24, 2025
Wednesday, April 2, 2025
Tuesday, April 8, 2025
Thursday, April 17, 2025
Friday, April 25, 2025
Thursday, May 15, 2025
Tuesday, September 16, 2025
Wednesday, October 8, 2025
Monday, November 17, 2025

BOOK BONUS!

Wisconsin Probate System: Forms and Procedures Handbook

SAVE 15% on *Wisconsin Probate System: Forms and Procedures Handbook*. * Discover a straightforward approach to probate practice along with the same forms, letters, checklists, and other tools you need to probate an estate successfully. Use **discount code CA3752** when you order online or by calling (800) 728-7788.



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REGISTRATION & GENERAL INFO

ONLINE: wisbar.org/seminars

PHONE: (800) 728-7788

MAIL/FAX: Visit 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 up to two days prior to and 90 days after your seminar.

CANCELLATIONS: Please visit wisbar.org/cancellations for information on PINNACLE registration cancellation policies.

ACCOMMODATIONS: If you need special accommodations, please contact us at (800) 728-7788, ext. 6142 at least three weeks prior to the program date so we can make appropriate arrangements.

RPPT SECTION MEMBERS SAVE \$50 Real Property, Probate and Trust Law Section members receive \$50 off tuition for the in-person and webcast presentations of these seminars. See tuition chart for complete details. **Not a section member?** Join today to save on tuition for these programs and to gain access to additional valuable section resources and benefits. Visit wisbar.org/sections to join.

YOUNG LAWYERS SAVE \$20! PINNACLE knows that you're at the critical point in your career where you're developing your skills and practice, which is why Young Lawyers Division Members receive \$20 off tuition for any of the Build Your Practice seminars.

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.

TUITION*

	IN-PERSON	WEBCAST
State Bar Member	\$249	\$279
Nonmember	\$329	\$359
RPPT Section Member**	\$199	\$229
YLD Member***	\$229	\$259
Ultimate Pass Gold/Silver	\$0	\$0
Ultimate Pass Bronze	\$249	\$0
Passbook Certificate	1 Certificate	1 Certificate

*Tuition shown above is for each full-day program.

** 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.

*** Young Lawyers Division (YLD) members: 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.

These programs are sponsored by:

