STATE BAR OF WISCONSIN
PINNACLE

# Step-by-Step Estate Planning I

*and*

# Step-by-Step Estate Planning II



**Program dates start January 28. Register today!**

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 28, 2026

**Step-by-Step Estate Planning II**
6.5 CLE Credits
Program dates start February 27, 2026

# Step-by-Step Estate Planning I & Step-by-Step Estate Planning II

*Endorsed by the State Bar of Wisconsin's Real Property, Probate & Trust Law Section and Young Lawyers Division*

## The skills to write the wills

Whether you're just starting out in estate planning, brushing up on the essentials, or expanding your client services, the ***Build Your Practice: Estate Planning Series*** offers practical guidance for lawyers at every experience level.

RPPT Section members SAVE $25 and YLD members SAVE $20 on tuition for these programs!

***Step-by-Step Estate Planning I*** gives you a clear, well-organized introduction to the building blocks of effective estate planning.

### How you'll benefit:

- Gain confidence applying foundational planning concepts in real client matters
- Explore different types of trusts and how to use them in planning
- Provide more informed guidance about planning options and tax implications
- Receive an introduction to estate, gift, and generation-skipping taxes
- Understand how trusts and marital property agreements are used in estate planning
- Be prepared to recognize frequently encountered ethical issues in estate planning
- Expand or refine your estate planning offerings to meet client demand

## From fundamentals to finesse

***Step-by-Step Estate Planning II*** advances your knowledge with more sophisticated tools and strategies designed for complex client needs.

### How you'll benefit:

- Draft with an eye toward both federal and Wisconsin estate tax requirements
- Deepen your understanding of retirement benefits and IRA considerations
- Apply advanced gifting approaches using trusts
- Address planning challenges for blended families, second marriages, and unmarried partners
- Gain clarity on generation-skipping transfer tax rules
- Understand how family limited partnerships or LLCs can strengthen a plan

**Register today!**

## TUITION*

| | IN-PERSON | WEBCAST |
|---|---|---|
| State Bar Member | $259 | $289 |
| Nonmember | $339 | $369 |
| RPPT Section Member** | $234 | $264 |
| YLD Member*** | $239 | $269 |
| Ultimate Pass Gold/Silver | $0 | $0 |
| Ultimate Pass Bronze | $259 | $0 |
| Passbook Certificate | 1 Certificate | 1 Certificate |

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

** The $25 **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. The YLD discount applies only to the in-person and webcast presentations of these seminars – NOT CLE OnDemand. YLD members with Ultimate Passes, other CLE passes, or PINNACLE discounts are not eligible for this discount.

## These programs are sponsored by:

BULTMAN Financial

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Wisconsin Lawyers WILMIC Mutual Insurance Company

# 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

*Peter J. Wyant*

**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
- Reducing taxable estates through lifetime giving
- Generation-skipping transfer tax and other issues

*Jacqueline L. Messler*

**10:30 AM** **Break**

**10:45 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
- Special trusts
- Trust modification/ termination and use of nonjudicial settlement agreements

*Amy J. Krier*

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

**1:00 PM** **Additional Core Estate Planning Documents**
- 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

*Jacqueline L. Messler*

**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

*Amy J. Krier*

**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

*Peter J. Wyant*

**4:00 PM** **Question & Answer**

**4:15 PM** **Program Concludes**

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

## FACULTY

**Amy J. Krier**
Certus Legal Group, Ltd.
Milwaukee

**Jacqueline L. Messler**
Amundsen Davis LLC
Brookfield

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

## 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, 28, 2026
**State Bar Center**
5302 Eastpark Blvd., Madison, WI

### Live Webcast

Wednesday, January 28, 2026

### Webcast Replay

Friday, February 6, 2026
Thursday, February 12, 2026
Tuesday, February 17, 2026
Monday, February 23, 2026
Saturday, February 28, 2026
Wednesday, March 4, 2026
Thursday, March 12, 2026
Monday, March 16, 2026
Thursday, April 16, 2026
Wednesday, May 27, 2026
Thursday, October 22, 2026
Tuesday, November 17, 2026

## BOOK BONUS!

### Eckhardt's Workbook for Wisconsin Estate Planners

**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 lawyers. **Use discount code CA3922** 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 12/31/27. 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.*

# 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

*Jamie B. Barwin*

**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

*Jamie B. Barwin*

**3:30 PM** **Program Concludes**

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

## FACULTY

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

**Bradley J. Kalscheur**
Michael Best & Friedrich LLP
Milwaukee

**Philip J. Miller**
Husch Blackwell LLP
Waukesha

## 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

Friday, February 27, 2026
**State Bar Center**
5302 Eastpark Blvd., Madison, WI

### Live Webcast

Friday, February 27, 2026

### Webcast Replay

Monday, March 9, 2026
Thursday, March 19, 2026
Wednesday, March 25, 2026
Tuesday, March 31, 2026
Saturday, April 11, 2026
Friday, April 17, 2026
Monday, April 20, 2026
Thursday, April 30, 2026
Thursday, May 28, 2026
Tuesday, June 16, 2026
Wednesday, October 21, 2026
Monday, November 16, 2026

## 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 CA3923** 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.*

# 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 *my*StateBar 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 $25** Real Property, Probate and Trust Law Section members receive $25 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. See tuition chart for complete details.

**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.

**Estate Planning I:** CA3922 | **Estate Planning II:** CA3923 **Priority Code:** S4691B

# ADDITIONAL LEARNING OPPORTUNITIES

## Estate Planning Essentials: Protecting Assets, Heirs, and Legacies



Refine your estate planning skills in half a day with this streamlined program covering fundamental tools, legacy property planning, beneficiary designations, and education funding strategies.

**Credits:** 4.5 CLE
**CLE OnDemand™:** CA3839D




## Marital Property Law & Practice in Wisconsin

This streamlined guide helps you handle marital property questions with practical tips, sample forms, agreements, and other time-saving tools. It's an ideal resource for attorneys working in tax, family law, estate planning, or creditor-debtor matters.

**Print Book:** AK0067 | **Books Unbound®:** AE0067_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

## 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.