

What Every Estate Planner Needs to Know About Real Estate

Practical guidance from estate planners, probate practitioners and real estate lawyers

The estate planner, whether in the large firm or in sole practice, is constantly dealing with issues involving real estate law. In the large firm, the estate planner needs to recognize the issues and to call on the appropriate specialists in the firm to deal with them or to resolve them independently. Similarly, the sole practitioner needs to recognize the issues and either solve them independently or refer them to a specialist.

This course helps estate planners gain the knowledge to identify the issues involved and to get a start toward their solutions. This program provides an overview of basic real estate transactions that estate planners frequently encounter; effective ways of dealing with common real estate related problems; and a summary of key points of model documents.

When a real estate transaction involves the Probate & Family Court, a host of issues emerge. This seminar addresses court involvement and offers tips on navigating your way through the maze. Topics include: death related liens, ancillary administration and sales by foreign fiduciaries, the effects of divorce, conveyances by special masters and commissioners, specific enforcement and curing title defects, as well as practical tips for a good, timely, probate conveyance.

You will learn how to deal with the following topics:

- ▶ Gifting interests
- ▶ Pre-approval of deed
- ▶ Lien releases
- ▶ Trustee certificates
- ▶ Joint tenancy and tenants in common
- ▶ Rights of creditors
- ▶ How title can be held
- ▶ Nominee trusts
- ▶ Disclaimers
- ▶ Residential exemptions
- ▶ License requirements
- ▶ Federal tax liens
- ▶ Transfer between husband and wife to balance estate
- ▶ Due on sale clauses on mortgages
- ▶ Avoiding probate
- ▶ Using irrevocable trusts
- ▶ Credit shelter trusts
- ▶ QPRTs
- ▶ Planning with vacation property

FACULTY

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BOSTON

2:00 p.m. – 5:00 p.m.,
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