Exclusively for New Lawyers

Estate Planning Professional Development Plan
24 units and topics

Featured Program—
In person or webcast

Unit 1: Overview and Initial Client Contact in an Estate Planning Matter
An experienced panel provides an efficient guide to successfully engaging the estate-planning client.

TOPICS
- Initial Client Inquiries
- Estate Planning Questionnaire
- Fee Structures—Hourly v. Flat Fees
- Initial Client Meeting
- Engagement Letters
- Notes/Documentation
- Ethical Issues and Conflicts of Interest

INSTRUCTORS
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- Jessica L. Lambert, Esq., Choate Hall & Stewart LLP, Boston
- Jaclyn S. O’Leary, Esq., Day Pitney LLP, Boston

BOSTON
12:00 noon – 2:00 p.m., Tuesday, November 4, 2014
MCLE Conference Center, 10 Winter Place, via Winter Street
Program No. 215007P01

LIVE WEBCAST
12:00 noon – 2:00 p.m., Tuesday, November 4, 2014
Register at www.mcle.org
Program No. 215007WBC

RECORDED WEBCAST
3:00 p.m. – 5:00 p.m., Tuesday, November 11, 2014
Register at www.mcle.org
Program No. 215007RBC

TUITION $35
(includes written materials)

Also available On Demand at www.mcle.org

Estate Planning Professional Development Plan:
24 units and topics

- Unit 1: Overview and Initial Client Contact in an Estate Planning Matter
- Unit 2: Estate, Gift, and Generation-Skipping Transfer Taxes
- Unit 3: Fundamental Testamentary Planning
- Unit 4: Marital Deduction Planning
- Unit 5: Lifetime Asset Transfers
- Unit 6: Charitable Giving Outright and in Trust
- Unit 7: Life Insurance
- Unit 8: Retirement Benefits
- Unit 9: Marital Agreements
- Unit 10: Estate Planning for Nontraditional Families
- Unit 11: Postmortem Estate Planning
- Unit 12: Preserving and Protecting the Family Business
- Unit 13: Living Wills, Durable Powers of Attorney, and Health-Care Proxies
- Unit 14: Planning for Incapacity/Elder & Disability Law
- Unit 15: Guardianships and Conservatorships
- Unit 16: Medicaid and Creditor Protection Trusts
- Unit 17: Trusts
- Unit 18: Irrevocable Trusts
- Unit 19: Drafting Estate Plans
- Unit 20: Drafting Wills & Trusts
- Unit 21: Ethical Issues for Estate Planners
- Unit 22: Preparing Fiduciary Income, Gift, and Estate Tax Returns
- Unit 23: Probate Practice
- Unit 24: Fiduciary Litigation, Including Will Contests, in the Probate Court

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### 2 PROGRAM REGISTRATION includes written materials

**OVERVIEW AND INITIAL CLIENT CONTACT IN AN ESTATE PLANNING MATTER**

- **In-Person:** Boston, November 4; 2150079P01
- **Webcast:** Live Webcast, November 4; 2150079WBC Recorded Webcast, November 11; 2150079RBC

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