SPECIAL TAUTON LOCATION

TURBOCHARGED Estate Planning Practice Upgrade 2019

Hone your skillset and improve your efficacy and profitability

Join leading practitioners and judges to analyze these advanced next-level issues!

Agenda

- **Guardianship and Conservatorships Update:** Get briefed on what you need to know and prepare for prior to filing for a Guardianship/Conservatorship. Learn when is the right time to file—and when to involve Elder Services and/or identify when family members present a conflict.
- **Crafting Estate Plans for Non-Taxable Estates:** With sample planning documents, checklists, and practical solutions to common client problems, you can identify the best approaches for the very many clients whose estates fall below the current federal estate tax threshold. Learn how to comprehensively assess your clients' needs, factoring in income tax, state estate tax, retirement assets, life insurance, and other essential considerations.
- **Asset Protection Strategies for Older Clients:** Advance planning is critical for clients interested in protecting assets from potentially catastrophic long-term care costs. Hear the latest techniques to protect assets while preserving a client's future eligibility for MassHealth benefits—from Wills with Testamentary Trusts, to Supplemental Needs Trusts and Irrevocable Trusts with sample language. And of tantamount importance, hear about the latest judicial and administrative responses to these strategies.
- **Reformation, Modification and Decanting of Trusts:** Learn how to analyze existing trust documents under recently developed case law, and effectuate any necessary changes. And hear tips on provisions to consider including in newly created trusts. Get sample forms—and leave with the essential strategies and techniques to repair and update your clients' trust documents.
- **Practical Technology and Digital Marketing Tools for Your Estate Planning Practice:** Law practice technology and digital marketing techniques have changed rapidly and it can be difficult to keep up. Yet, choosing and implementing the right technology and digital marketing tools are essential to your firm's productivity and profitability. Learn about the latest productivity products and digital marketing tools, and how those products can fit into and benefit your firm's workflows.
- **Ethical Issues in Estate Planning—Identification, Prevention and Cure**
- **MUTC/MUPC Best Practices from the Judicial Perspective:** Best practices for probate and trust administration in 2019.

Faculty

Eric R. Oalican, Esq., O*alican Law Group LLC, Raynham*, Chair; *Matthew P. Albanese, Esq., Albanese Law LLC, Milton*; Heidi S. Alexander, Esq., *Director, Massachusetts Law Office Management Assistance Program (LOMAP), Boston*; Dorothy S. Anderson, Esq., *Office of Bar Counsel, Commonwealth of Massachusetts*; Deborah K. Blum-Shore, Esq., *The Shore Law Firm, Attleboro*; David J. Correira, Esq., *Correira & Correira LLP, Swansea*; Hon. Anthony R. Nesi, *Bristol Probate and Family Court, Commonwealth of Massachusetts* (Ret.), *Hanna & Nesi Professional Services, Mattapoisett;* Hon. Peter Smola, *Bristol Probate and Family Court, Commonwealth of Massachusetts*; Leo M. Spano, Esq., *Gay & Gay, PC, Taunton*; Daniel M. Surprenant, Esq., *Surprenant & Beneski, PC, New Bedford*

Date & Location

TAUNTON
Friday, May 3, 2019
9:30 am–4:30 pm

Taunton Holiday Inn
700 Myles Standish Boulevard
Program Number: 2190109P01

Tuition *(includes written materials)*

- $245
- $220.50 MCLE Sponsor Members
- $183.75 New Lawyers admitted to law practice after 2016, Pending Admittees, Law Students, and Paralegals

Materials

The materials for this program include MCLE's *Massachusetts Probate Law Sourcebook & Citator 2019*, as well as a faculty-prepared program book available *online only,* which can be viewed or downloaded via the link emailed to you prior to the course.

Earn up to 6 CLE credits including up to 0.5 ethics credit

Choose from 5 easy ways to register and order!

Reference # 19-020

- **ONLINE** enter your credit card order at **www.mcle.org.**
- **MAIL** this order form with payment to MCLE, Inc., Ten Winter Place, Boston, MA 02108-4751.
- **FAX** your credit card order 24 hours a day to 617-482-9498.
- **CALL IN** your credit card order to 800-966-6253, Monday – Friday, 8:30 a.m. – 5:30 p.m.
- **WALK UP** on the day of the program or **DROP IN** to MCLE's bookstore, Monday – Friday, 8:30 a.m. – 5:30 p.m.

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Policies and Information

Register early!

For course agendas, hours, fees, and discounts, please refer to the respective seminar pages. The fee includes all written materials unless otherwise noted, program instruction, and refreshment breaks. Lunch may be enjoyed on your own.

To reserve seating and gain access to online materials, please register in advance of the program.

Upon registration, MCLE will e-mail a confirmation. Please check in with the registrar on the day of the program.

Walk-in registrants are welcome, with the exception of limited enrollment programs. Please call us to confirm space availability and schedule.

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For your convenience, MCLE also offers closed captioning CC and written transcripts of all recorded webcast programs, available to you online two weeks after the program date.

Mandatory CLE credits

States have varying mandatory CLE credit requirements; individual attorneys are responsible for checking with their particular state CLE accreditation authority about whether and how much credit will be granted. Although MCLE does not pursue state-based credit, MCLE programs are regularly approved in many jurisdictions. It is the responsibility of the individual attorney interested in CLE credit to submit the information and certifications required under the respective state rule to the appropriate state authorities in the jurisdictions in which they seek credit.

Depending on the jurisdiction, lawyers can satisfy their mandatory CLE requirements online with MCLE's webcasts, which feature periodic attendance prompts, online written materials, and the opportunity to receive a certificate of attendance.

If your plans change

If you're unable to attend a program you've registered for, you will receive an email notification shortly after about how to access the program on demand via webcast and/or downloadable mp3 file, including the written materials in electronic form, in full satisfaction of the tuition paid. If you prefer a refund, let us know by the end of the business day prior to the program and we'll refund your tuition after deducting a $25 processing fee. Note that limited enrollment programs are an exception, cancellation of which require two weeks notice and are subject to a $45 processing fee.

Attorney scholarships

Attorneys with financial need who certify that they are unable to attend a program without financial aid may request a partial tuition scholarship in confidence by writing or emailing scholarships@mcle.org **at least two weeks in advance of the program.**

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For the first three years of practice, MCLE offers new lawyers a 25% discount on all of its products, including programs (whether attending in person or via live or recorded webcast), books, audio CDs and mp3 recordings. If you were admitted to the bar after 2016, you can take advantage of the new lawyer prices listed throughout the catalog.

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- Solo Practitioners $95
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  - 6-10 250
  - 11-25 500
  - 26-75 1,000
  - 76-150 .... $ 2,500
  - 151-250 3,500
  - 251+ 4,500