SPECIAL WOBURN LOCATION

TURBOCHARGED Estate Planning Practice Upgrade 2019

Leading practitioners and judges analyze advanced next-level issues!

Agenda

- **Guardianship and Conservatorship Update 2019:** Learn what you need to know and have in place before filing. Identify the right circumstance to file for one, and not the other. When defending a petition, know when to obtain an independent medical examination, and when to involve elder services.
- **Avoiding the Traps and Pitfalls Associated with Blended Families:** Learn planning techniques for blended families, including children from prior relationships, and how to avoid the pitfalls exhibited in recent case law. Learn the questions to ask and the drafting methods to reduce the chances of litigation.
- **Crafting Estate Plans for the Non-Taxable Estate:** Learn the best approaches for solving common client problems when dealing with estates below the current federal estate tax threshold. Identify the best approaches for dealing with retirement assets, life insurance, and other considerations, including protecting the inheritance of individuals who may have mental health or substance abuse issues.
- **Reformation, Modification and Decanting of Trusts:** Learn how to analyze existing trust documents under recent case law, and how to effectuate necessary changes to the documents to meet the client's ultimate wishes. Hear practical tips on provisions to include in newly created trusts, and strategies and techniques to best update your clients' trust documents.
- **Practical Technology and Digital Marketing Tools for Estate Planning:** Law practice technology and digital marketing techniques have changed rapidly. Choosing and implementing the right technology and tools for your practice is essential. Learn about the latest productivity products and digital marketing tools, and how they may fit into your practice to increase productivity and profitability, and benefit your firm.
- **Asset Protection Strategies for Older Clients:** Advance planning is necessary for clients interested in protecting their assets from long-term care costs. Hear the techniques available to protect assets while preserving the client's future eligibility for Medicaid benefits, including Wills with Testamentary Trusts, Supplemental Needs Trusts, and Irrevocable Trusts—and what they will be giving up to protect assets for later generations.
- **MUTC/MUPC:** Best practices for probate and trust administration.

Faculty

Sheryl J. Dennis, Esq., *Fields and Dennis LLP, Wellesley,* Chair; Heidi S. Alexander, Esq., *Director, Massachusetts Law Office Management Assistance Program (LOMAP), Boston;* Anna M. Byrne, Esq., *Eckert Byrne LLC, Cambridge;* Lisa M. Cukier, Esq., *Burns & Levinson LLP, Boston;* Patricia Keane Martin, Esq., *Seegel Lipshutz & Lo LLP, Wellesley Hills;* Allison M. McCarthy, Esq., *Riemer & Braunstein LLP, Boston;* Hon. George F. Phelan, *Norfolk Probate and Family Court, Commonwealth of Massachusetts;* Tannaz N. Saponaro, Esq., *Saponaro Bingham LLP, Wellesley;* Ryan J. Swartz, Esq., *McLane Middleton, Woburn;* Hon. Jennifer M. R. Ulwick, *Essex Probate and Family Court, Commonwealth of Massachusetts*

Date & Location

WOBURN
Friday, October 25, 2019
9:30 am–4:30 pm

Courtyard by Marriott
700 Unicorn Park Drive
Woburn
Program Number: 2200093P01

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,* which can be viewed or downloaded via the link emailed to you prior to the course. Attendees get a print copy.

Earn up to 6 CLE credits

Choose from 5 easy ways to register and order!

Reference # 22-020

- **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.
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- **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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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.

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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.

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