

## SEMINAR

# Estate Planning: MCLE BasicsPlus!®

*Learn the law and acquire skills to be successful*

*Estate Planning: MCLE BasicsPlus!* is intended to give practitioners a solid foundation in the legal concepts and skills necessary to establish a successful estate planning practice. Attendees receive guidance on preparing standard estate planning documents like wills, trusts, health care proxies, and powers of attorney based on clients' unique personal and financial situations; establishing a client relationship and conducting client meetings; navigating ethical issues that commonly arise in the planning process; administering a trust properly; and dealing with various types of assets. The seminar also provides an overview of fundamental technical issues that are essential for any estate planner, including transfer tax issues and elder law issues.

## Agenda

- Fundamentals of Estate Planning
- Initial Steps with Clients, Including Engagement Letters and Information Gathering
- Fundamentals of Trusts
- Income and Transfer Taxes Issues
- Marital Deduction Planning
- Planning for Retirement Benefits
- Ethical Issues in Estate Planning
- Elder Law Issue Spotting, Medicaid Planning, and Care Manager's Perspective
- Post-Mortem Planning
- "Ask the Experts" Q&A Session

## Faculty

Aimee Fukuchi Bryant, Esq., *Nutter McClennen & Fish LLP, Boston*, Cochair  
Nikki Marie Oliveira, Esq., *Nutter McClennen & Fish LLP, Boston*, Cochair  
Paul Cathcart, Jr., Esq., *Hemenway & Barnes LLP, Boston*  
Heather B. Cheney, Esq., *BNY Mellon Wealth Management, Boston*  
Jessica A. Demmerly, Esq., *Rubin and Rudman LLP, Boston*  
Sarah F. Hartline, Esq., *Margolis & Bloom LLP, Wellesley Hills*  
Kristin M. Kelley, CPA, MST, KLR, *Private Client Services Group, Waltham*  
Jennifer M. Lo, Esq., *Seegel Lipshutz Lo & Martin LLP, Wellesley Hills*  
Laurel M. Millette, Esq., *Transitions Law LLC, Concord*  
Kristin A. Monaco, Esq., *Nigro, Pettepit & Lucas LLP, Newburyport*  
Anna L. Pollard, LICSW, C-ASWCM, *Director of Clinical Services/Life Care Manager, LifeCare Advocates, Newton Center*  
John H. Ramsey, Esq., *Goulston & Storrs, PC, Boston*  
Michael J. Rossi, Esq., *Conn Kavanaugh Rosenthal Peisch & Ford LLP, Boston*  
Jennifer D. Taddeo, Esq., *Conn Kavanaugh Rosenthal Peisch & Ford LLP, Boston*

## Dates & Location

### LIVE WEBCAST

Wednesday, December 15;  
Thursday, December 16; &  
Friday, December 17, 2021  
9:00 am–1:00 pm

Register at [www.mcle.org](http://www.mcle.org)  
Program Number: 2220047WBC

### REBROADCAST

Tuesday, December 28;  
Wednesday, December 29; &  
Thursday, December 30, 2021  
1:00 pm–5:00 pm

Register at [www.mcle.org](http://www.mcle.org)  
Program Number: 2220047RBC

### REBROADCAST

Monday, January 10;  
Tuesday, January 11; &  
Wednesday, January 12, 2022  
9:00 am–1:00 pm

Register at [www.mcle.org](http://www.mcle.org)  
Program Number: 2220047RB1

### ON DEMAND WEBCAST

View after Wednesday, January 12, 2022

Register at [www.mcle.org](http://www.mcle.org)  
Program Number: 2220047WBA

## Tuition *(includes written materials)*

- \$295
- \$265.50 MCLE Sponsor Members
- \$221.25 New Lawyers admitted to law practice after 2018, Pending Admittees, Law Students, and Paralegals

To apply for a need-based scholarship, email [scholarships@mcle.org](mailto:scholarships@mcle.org).

## Materials

The materials for this program include MCLE's *A Practical Guide to Estate Planning in Massachusetts*, which, along with any other materials, can be downloaded via the link emailed to you upon registration. Also, there is no need to take extensive notes. Two weeks after the live webcast, all registrants receive a link to a verbatim transcript of this program.

## CLE Credits

Earn up to 12 CLE credits  
including up to 1 ethics credit



## Subscribe to the MCLE OnlinePass®

for instant access to this program and everything else MCLE offers online.

Learn more at [www.mcle.org](http://www.mcle.org)

## About MCLE

Massachusetts Continuing Legal Education, Inc. (MCLE | New England™) has been the Massachusetts legal community's premier provider of hands-on programs, practical reference materials, and online resources for over 50 years.

MCLE is a self-supporting, independent, not-for-profit educational institution. We depend solely upon sponsor membership dues, program registration fees, publications sales, online subscriptions, and charitable contributions to finance our instructional activities and to sustain growth and innovation in our programs, publications, and online products and services.

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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 program instruction and all electronic written materials unless otherwise noted.

To gain early access to online materials, please register in advance of the program.


Upon registration, MCLE will e-mail a confirmation.

Day-of-the-program registrations are welcome, with the exception of limited enrollment programs, or as otherwise noted.

We accept cash, checks, MasterCard, Visa, American Express, and Discover.

## Need special assistance?

If you are a person with a disability or special needs, please let us know in advance so that we can make your experience as convenient and comfortable as possible. Call Customer Service at 800-966-6253 to make arrangements.

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

## Mandatory CLE credits

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 to submit the information and certifications required under the respective state rule to the appropriate 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, electronic written materials, and the opportunity to receive a certificate of attendance.

## If your plans change

If you're unable to participate in a program on the date for which you registered, you will receive an email 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 \$35 processing fee. Note that limited enrollment programs are an exception, cancellation of which require two weeks notice and are subject to a \$55 processing fee.

## New lawyer discounts—always the lowest price

For the first three years of practice, MCLE offers new lawyers a 25% discount on all of its products, including programs, books, audio CDs and mp3 recordings. If you were admitted to the bar after 2018, take advantage of the new lawyer prices listed throughout the catalog.

Pending admittees, law students and paralegals are also eligible for a 25% discount on most MCLE programs.

## 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](mailto:scholarships@mcle.org) at least two weeks in advance of the program.

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MCLE Sponsorship runs for 12 months beginning September 1. The fee for firm,

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- Solo Practitioners ..... \$95
- Firms by number of Massachusetts attorneys:
  - 2-5 .... \$ 150
  - 6-10 .... 250
  - 11-25... 500
  - 26-75... 1,000
  - 76-150 ... \$ 2,500
  - 151-250 .. 3,500
  - 251+ ..... 4,500

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REFERENCE # 22-020

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