

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
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
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
Program Number: 2220047RB1

ON DEMAND WEBCAST

View after Wednesday, January 12, 2022

Register at 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.

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



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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.

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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.

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Attorney scholarships

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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

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REFERENCE # 22-020

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