

Will & Trust Drafting: MCLE BasicsPlus!®

Master the estate planning fundamentals you need for your practice

This two-day, comprehensive look at the key elements of will and trust drafting is an indispensable course for every new estate planner. Expert practitioners guide you through all the drafting essentials, from pre-drafting considerations to complex clauses to related property and tax issues. You learn practical guidelines and paramount drafting techniques, and have the opportunity to get all your drafting questions answered. Come away with the tools and skills you need to effectively prepare will and trust documents that you can use immediately in your practice.

Agenda

- **Preliminary Matters and Incapacity Documents:** The initial client meeting; Competence and joint representation; Durable power of attorney; Health care proxy
- **Will Provisions:** Tax clauses and apportionment statutes; The impact of tax clauses and statutes on the disposition of the testator's property; Choice of executors and guardians for minor children; Powers of executors; Execution of wills; Drafting codicils
- **Drafting the Trust:** Establishment of the trust; Power to amend or revoke; Trust property; Marital deduction formulas; Forms of marital and family trusts
- **Trust Provisions:** Important, yet often underemphasized, trust provisions, including discretionary payment provisions, early termination provisions, comprehensive investment provisions, and special asset management provisions; Trustee appointment, resignation, and removal powers
- **Special Trusts:** A detailed examination of a sound estate plan for a married couple, including a discussion of the use of trusts in exemption amount (tax shelter planning), marital deduction (tax deferral planning), and implementation of planning opportunities involving unused federal estate/gift tax exemptions (portability planning)
- **Special Trust Provisions:** An overview of the generation-skipping tax
- "Ask the Experts" Q&A Session

Faculty

Courtney N. Carr, Esq., *Choate Hall & Stewart LLP, Boston, Chair*

Lisa A.H. McChesney, Esq., *Goodwin Procter LLP, Boston*

Colin O. Sherer, Esq., *Burnett & Sherer LLC, Providence, RI*

Patricia Schatzlein Smock, Esq., *Vice President & Trust Counsel, Fiduciary Trust Company, Boston*

Molly R. Soiffer, Esq., *Bove & Langa, PC, Boston*

Jon E. Steffensen, Esq., *McLane Middleton, Boston*



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Dates & Location

Register at www.mcle.org

BOSTON

Monday, April 4 &
Tuesday, April 5, 2022
9:30 am–4:30 pm

MCLE Conference Center,
10 Winter Place, via Winter Street
Program Number: 2220124P01

LIVE WEBCAST

Monday, April 4 &
Tuesday, April 5, 2022
9:30 am–4:30 pm
Program Number: 2220124WBC

REBROADCAST ☒

Tuesday, April 19 &
Wednesday, April 20, 2022
9:30 am–4:30 pm
Program Number: 2220124RBC

REBROADCAST ☒

Wednesday, April 27 &
Thursday, April 28, 2022
9:30 am–4:30 pm
Program Number: 2220124RB1

ON DEMAND WEBCAST ☒

View after Thursday, April 28, 2022
Program Number: 2220124WBA

Tuition *(includes written materials)*

- \$275
- \$247.50 MCLE Sponsor Members
- \$206.25 New Lawyers admitted to law practice after 2019, 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 practice handbook, *Drafting Wills and Trusts 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.

Can't Attend Live?

View the OnDemand webcast later, or get the audio recording on CD or as an mp3 download at www.mcle.org

Earn up to 12 CLE credits
including up to 0.5 ethics credit

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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.

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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.

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corporate law department, or agency membership is calculated based on the number of Massachusetts admittees within the organization. Benefits of membership extend to all lawyers and non-lawyer professionals associated with the organization.

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

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REFERENCE # 22-020

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- ▶ **WALK UP** on the day of the program or **DROP IN** to MCLE's bookstore, Monday – Friday, 8:30 am–5:00 pm

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