

Understanding & Using Trusts: MCLE BasicsPlus!®

A thorough foundation in every aspect of the trust process

Every estate planner knows that trusts are an essential and widely used estate planning tool, but not all estate planners have the in-depth understanding of trusts they really need in order to serve their clients effectively. A thorough understanding of trust formation and administration is critical across many areas of specialization, including tax, real estate, finance, litigation, elder law, and nonprofit law. It is equally important when advising clients to understand the technical rules governing trusts and how Massachusetts statutes and common law may affect both trustees and beneficial interest holders.

Experts guide you step-by-step through the life of a trust, from beginning the trust to ongoing administration to wrapping up. They analyze the latest updates and provide valuable advice on key, cutting-edge issues. You leave with a thorough overview of how trusts work and how to use them to achieve your clients' goals.

Agenda

- Basic Estate Planning; Probate; Family Issues
- Trust Overview
- The Duties and Powers of a Trustee
- Transfer Taxes: Gift, Estate, GST
- Marital Deduction Planning: Requirements and Administration
- Trust Funding: Funding Intervivos Trusts and Trust Splitting at Death
- Charitable Trusts
- Advanced Strategies (GRATs, SLATs, IDGTs); Income and Estate Tax Advantages and Disadvantages
- Medicaid Planning and Elder Law Issue Spotting
- "Ask the Experts" Q&A Session

Faculty

Jennifer F. Galvagna, Esq., *Bank of America, Private Bank, Boston*, Chair
Caroline Brooks, Esq., *John Hancock, Boston*
Sean T. Donovan, Esq., *The Northern Trust Company, Boston*
Annette K. Eaton, Esq., *The Northern Trust Company, Boston*
Richard B. James, Esq., *Bank of America, Private Bank, Boston*
Renat V. Lumpau, Esq., *Choate Hall & Stewart LLP, Boston*
David S. Raymon, Esq., *Burns & Levinson LLP, Boston*

Dates & Location

Register at www.mcle.org

BOSTON

Tuesday, February 8, 2022
9:30 am–4:30 pm

MCLE Conference Center,
10 Winter Place, via Winter Street
Program Number: 2220125P01

LIVE WEBCAST

Tuesday, February 8, 2022
9:30 am–4:30 pm
Program Number: 2220125WBC

REBROADCAST

Wednesday, February 23, 2022
9:30 am–4:30 pm
Program Number: 2220125RBC

REBROADCAST

Thursday, March 3, 2022
9:00 am–4:00 pm
Program Number: 2220125RB1

ON DEMAND WEBCAST

View after Thursday, March 3, 2022
Program Number: 2220125WBA

Tuition *(includes written materials)*

- \$245
- \$220.50 MCLE Sponsor Members
- \$183.75 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, *Understanding and Using Trusts*, 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

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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.

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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.

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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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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

Order Form Winter 2022

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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