

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

Earn up to 6 CLE credits



Subscribe to the MCLE OnlinePass®

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

Learn more at 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.

Board of Trustees

Eric P. Hayes, *President*
Brendan T. St. Amant, *First Vice President*
Michael P. Sams, *Second Vice President*
Katherine A. Hesse, *Treasurer*
Kendi E. Ozmon, *Secretary*
Heidi S. Alexander
Christa A. Arcos
Kendra L. Berardi
Joshua M. Bowman
Gabriel Cheong
Robert P. Cooper
Kara M. DelTufo
Prasant D. Desai
Shira M. Diner
Hon. Alexander Mitchell-Munevar
Peter M. Moldave
Terrence L. Parker
C. Max Perlman
Rebecca G. Pontikes
Ingrid C. Schroffner
Sunila Thomas-George
Richard C. Van Nostrand
Joseph P.J. Vrabel
Richard S. Milstein, *Founding Director*
John M. (Jack) Reilly, *Executive Director*
Salvatore Ricciardone, *Director of Philanthropy & Special Projects*

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.

Save all year long— become an MCLE Sponsor Member!

Become a Sponsor Member and receive:

- **Public recognition** on our website;
- Significant savings on a **subscription to MCLE's OnlinePass®**;
- **10% discount** on all programs, books, audio CDs, and mp3 recordings;
- Weekly **e-mail updates** and **advance notice** of sales and new product releases; and
- The **highest level of service** offered by your own Sponsor Account Specialist.

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

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 **at least two weeks in advance of the program.**

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

Order Form Winter 2022

REFERENCE # 22-020

Choose from 5 easy ways to order!

- ▶ **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.
- ▶ **FAX** your credit card order 24 hours a day to 617-482-9498.
- ▶ **CALL IN** your credit card order to (800) 966-6253, Monday – Friday, 8:30 am–5:00 pm
- ▶ **WALK UP** on the day of the program or **DROP IN** to MCLE's bookstore, Monday – Friday, 8:30 am–5:00 pm

1 CUSTOMER INFORMATION

Year Admitted to MA Bar _____ Title (if any) _____ BBO # _____

Last Name _____ First Name _____ Middle Initial _____

Firm/Agency _____

Street Address _____ Suite/Floor _____

City _____ State _____ ZIP+4 _____

Telephone _____ Fax _____

Order confirmation? Enter your email address: _____

2 ORDER DETAILS

Not an MCLE Sponsor Member? Become one today and receive the MCLE Sponsor Member discounted prices on this order! (see fee chart on previous page)

Product No.	Title	Automatic book update	Cost
_____	_____	Opt-out <input type="checkbox"/>	\$ _____
_____	_____	Opt-out <input type="checkbox"/>	\$ _____
_____	_____	Opt-out <input type="checkbox"/>	\$ _____
PROGRAMS SUBTOTAL			\$

BOOKS & AUDIO CDs (For eBook options, visit www.mcle.org)		Automatic book update	Cost
Product No.	Title		
_____	_____	Opt-out <input type="checkbox"/>	\$ _____
_____	_____	Opt-out <input type="checkbox"/>	\$ _____
_____	_____	Opt-out <input type="checkbox"/>	\$ _____
_____	_____	Opt-out <input type="checkbox"/>	\$ _____
Shipping & handling			\$ 8.50
BOOKS & AUDIO CDs SUBTOTAL			\$

3 PAYMENT METHOD

GRAND TOTAL

Check payable to MCLE enclosed

Card number _____ Expiration date _____ CVC _____

Cardholder's name _____ Cardholder's signature _____