

Avoiding & Fixing What Can Go Wrong in Flow-Through of Assets in Estate Planning

Pour-over funding issues and problems when planning fails

Learn how to draft wills and trusts to avoid common issues that arise with the flow-through of assets in estate planning and how to address funding issues and problems that arise when planning fails.

If you have a fabulous estate plan but don't align the reality of your assets with that plan, the consequences can be disastrous and expensive. In today's estate planning landscape, flow-through plans are ubiquitous. Hear from experienced estate planner, Jennifer Taddeo, and litigator, Darian Butcher, as they discuss strategies for drafting, funding, and fixing in the context of these common and complicated plans.

Agenda

- **What Does "Pour Over" Mean?**
- **Common Mistakes and How to Avoid Them**
Beneficiary designations meet terms of trust
Difficult-to-fund assets
- **Litigating Planning and Funding Mistakes**

Speakers



DARIAN M. BUTCHER is the founder of Butcher Law LLC in Boston. She represents clients in connection with all stages of probate and fiduciary litigation, guardianships, and conservatorships in both state and federal trial and appellate courts. Darian also serves as a professional fiduciary. Before founding Butcher Law, Darian practiced probate, fiduciary and complex commercial litigation at Day Pitney LLP. She also previously clerked at the Massachusetts Appeals Court for the Honorable R. Malcom Graham (Ret.). Darian currently serves as the co-chair of the Trusts & Estates Education Committee of the Boston Bar Association, a Council Member on the Probate Law Section Council of the Massachusetts Bar Association, a member of the Massachusetts Supreme Judicial Court Standing Committee on Lawyer Well-Being, and as the President of the Board of Directors of GLBTQ Legal Advocates & Defenders (GLAD).



JENNIFER D. TADDEO is a partner at Conn Kavanaugh Rosenthal Peisch & Ford LLP in Boston, where she concentrates her practice in estate planning and probate and trust administration. She works with clients to develop and implement estate plans that reflect both their financial and personal goals. She is experienced in drafting wills, trusts, health care proxies, durable powers of attorney and other estate planning documents. Her expertise in estate administration extends to complex tax and disclaimer issues. Ms. Taddeo also works with entrepreneurs and business owners to create and maintain business entities that provide her clients with business, legal, and tax advantages. Ms. Taddeo received her undergraduate degree from the American University in 1996 and her law degree from Georgetown University Law Center in 1999, both in Washington, D.C. She received her LL.M. in taxation at Boston University in 2007. Attorney Taddeo has presented seminars to the Boston Bar Association, Massachusetts Bar Association, Massachusetts Continuing Legal Education, the Women's Success Network and other community organizations on estate planning fundamentals, the use of irrevocable life insurance trusts and "What Every Woman Should Know About the Law™." She is a Co-Chair of the Boston Bar Association's Trust & Estates Section's Communications Committee and a past Co-Chair of the Section's Estate Planning Fundamentals Committee and received her Accredited Estate Planner designation in 2019. Ms. Taddeo is an active alumna of Chi Omega Fraternity.



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Wednesday, February 16, 2022
12:00 noon–1:00 pm
Program Number: 2220126WBC

REBROADCAST

Thursday, March 3, 2022
3:00 pm–4:00 pm
Program Number: 2220126RBC

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Friday, March 11, 2022
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