

## SEMINAR

# Probate Practice: MCLE BasicsPlus!®

### *Comprehensive guide for administering an estate*

The complex rules of the Massachusetts Uniform Probate Code (MUPC) and the Massachusetts Uniform Trust Code (MUTC) make it essential for practitioners to fully understand the ins and outs of the law and procedure. This *comprehensive two-day review* gives you a strong foundation in the complete administration of an estate. Trust and estate experts discuss key provisions of the MUPC and the MUTC and offer essential tips and key techniques. Learn about the entire estate administration process, from pre-probate considerations to allowance of the final account, with special emphasis on handling the modest estate. Hear expert advice on trust related issues. Get valuable forms, checklists, and pointers, as well as the chance to have all your questions answered. Be ready for your next probate client!

### Agenda

- Chronology of Estate Administration: Preliminary Matters; Managing Client Relationship/Educating the Personal Representative; Checklist Probate Manual
- Options to Open an Estate; Will Contests and Other Objections
- Collection and Management of the Estate; Sale of Real Estate; Debts and Creditor Claims
- Spousal Elective Share
- Taxation of the Estate
- Post Mortem Planning
- Trusts—Testamentary and Interplay Between Trusts and Estates
- Final Distribution of the Estate; Options to Close; Probate Accounts
- Probate Litigation
- Digital Assets and Estate Administration
- “Ask the Experts” Q&A Session

### Faculty

Evelyn J. Patsos, Esq., *Deputy Legal Counsel, Probate and Family Court, Commonwealth of Massachusetts*, Cochair; Mary H. Schmidt, Esq., *Schmidt & Federico, PC, Boston*, Cochair; Julie E. Braverman-Bruno, Esq., *Schmidt & Federico, PC, Boston*; Darian M. Butcher, Esq., *Butcher Law LLC, Boston*; Hon. Edward F. Donnelly, Jr., *Middlesex Probate and Family Court, Commonwealth of Massachusetts (Ret.)*; Kristin N.G. Dzialo, Esq., *Rubin and Rudman LLP, Boston*; Jennifer Z. Flanagan, Esq., *Vacovec, Mayotte & Singer LLP, Newton*; Jennifer T. Fleming, Esq., *Prince Lobel Tye LLP, Boston*; Catherine Olender Neijstrom, Esq., *Gilmore, Rees & Carlson, PC, Wellesley*; Edward Notis-McConarty, Esq., *Hemenway & Barnes LLP, Boston*; Pamela C. O'Brien, Esq., *Essex Probate and Family Court, Commonwealth of Massachusetts*; Heather Bartel Reid, Esq., *Squillace & Associates, PC, Boston*; Lisa M. Rico, Esq., *Rico, Murphy, Diamond & Bean LLP, Natick*; Marshall D. Senterfitt, Esq., *Goulston & Storrs, PC, Boston*; Ryan J. Swartz, Esq., *McLane Middleton, Woburn*; Karen L. Witherell, Esq., *Bove & Langa, PC, Boston*

### Dates & Location

Register at [www.mcle.org](http://www.mcle.org)

#### LIVE WEBCAST

Thursday, May 12, &  
Friday, May 13, 2022  
9:30 am–4:30 pm  
Program Number: 2220216WBC

#### REBROADCAST

Tuesday, May 31, &  
Wednesday, June 1, 2022  
9:30 am–4:30 pm  
Program Number: 2220216RBC

#### REBROADCAST

Wednesday, June 8, &  
Thursday, June 9, 2022  
9:30 am–4:30 pm  
Program Number: 2220216RB1

#### ON DEMAND WEBCAST

View after Thursday, June 9, 2022  
Program Number: 2220216WBA

### Tuition *(includes written materials)*

- \$275
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### Materials

The materials for this program include MCLE's *Massachusetts Probate Manual*, 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



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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.

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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.

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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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Pending admittees, law students and paralegals are also eligible for a 25% discount on most MCLE programs.

## Attorney scholarships

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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.

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