

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

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

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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.

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 - 11-25 ... 500
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REFERENCE # 22-022

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