

## SEMINAR

# Estate Planning: MCLE BasicsPlus!®

### *Developing a plan for the intermediate estate*

A successful estate planning practice requires knowledge of federal and state statutes, rulings, and case law on a variety of substantive areas including taxation, trust, will, and property law. You must also possess finely tuned interview and drafting skills, as well as the ability to elicit and effectively use a substantial body of financial and personal data for each client.

This program gives you an overview of planning for a modest estate and the in-depth knowledge you need to plan for a variety of estate matters and run your practice well. The faculty focus on the practical application of the law and skills involved in planning an estate value of less than \$2,000,000, although concerns that arise in larger estates are also covered. You learn to draft estate planning instruments while considering the impact of both the Massachusetts and the federal estate tax exemptions. You also get advice on how to prepare wills, trusts, health care proxies, and powers of attorney based on your client's financial situation.

### Agenda

- Initial Steps, Fundamentals, and Estate Planning Documents
- Medicaid and Long-Term Care Planning
- Fiduciary Income Tax Planning
- Planning with Life Insurance
- Estate, Gift, and GST Tax Planning
- Business Succession Planning
- Post-Mortem Planning
- Charitable Planning
- Ethics Hypotheticals
- "Ask the Experts" Q&A Session

### Faculty

Katherine M. Sheehan, JD, *Managing Director & Fiduciary Advisor, SVB Private Bank, Boston, Chair*

Patricia C. D'Agostino, Esq., *Margolis & Bloom LLP, Wellesley*

Brian J. DesRosiers, Esq., *DesRosiers & Tierney LLC, Boston*

Laura T. Godine, JD, *Director of Wealth Planning, Eaton Vance WaterOak Advisors, Boston*

Amy R. Lonergan, Esq., *Day Pitney LLP, Boston*

Richelle Maguire, CPA, *DiCicco, Gulman & Company LLP, Woburn*

Heidi A. Seely, Esq., *Day Pitney LLP, Boston*

Christopher A. Voukides, Esq., *Day Pitney LLP, Boston*

### Dates & Location

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

#### LIVE WEBCAST

Tuesday, August 2, &  
Wednesday, August 3, 2022  
9:30 am–4:30 pm  
Program Number: 2220217WBC

#### REBROADCAST

Wednesday, August 17, &  
Thursday, August 18, 2022  
9:30 am–4:30 pm  
Program Number: 2220217RBC

#### REBROADCAST

Thursday, August 25, &  
Friday, August 26, 2022  
9:30 am–4:30 pm  
Program Number: 2220217RB1

#### ON DEMAND WEBCAST

View after Friday, August 26, 2022  
Program Number: 2220217WBA

### Tuition *(includes written materials)*

- \$275
- \$247.50 MCLE Sponsor Members
- \$206.25 New Lawyers admitted to law practice after 2019, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass® Subscribers

To apply for a need-based scholarship, email [scholarships@mcle.org](mailto:scholarships@mcle.org).

### Materials

The materials for this program include MCLE's *A Practical Guide to Estate Planning in Massachusetts*, 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 including up to 1 ethics credit



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

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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.

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.

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## 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](mailto: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

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REFERENCE # 22-022

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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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