

SEMINAR

Best Practices in Planning Shared Ownership of Real Estate

Learn about various considerations in structuring shared ownership of real estate

Individuals routinely desire to own residential real estate jointly with another; there are several ways to accomplish this goal. Explore options for how to structure ownership of shared property and learn about the benefits and drawbacks of the various options. Hear the panelists discuss the different ways for individuals to hold joint title, cohabitation agreements, and the issues that arise when a co-owner passes away. The panelists also address restrictions that can be imposed to prevent the transfer of joint ownership to another.

Agenda

- Structuring Shared Property Ownership: Individual; Entity; Trust Options
- Title Issues That Arise in the Shared Property Ownership Context
- Cohabitation Agreements
- Restrictions in Transferring Ownership
- What Happens When a Co-Owner Dies

Speakers



LUKE C. BEAN is a partner with the firm of Rico, Murphy, Diamond & Bean LLP in Natick, where he focuses on all aspects of estate planning and estate and trust administration, with an emphasis on planning for non-traditional families and complex tax planning and administration issues. He is a graduate of Boston College Law School and Pennsylvania State University. He also holds his LL.M. in Taxation from Boston University School of Law.



DONNA A. MIZRAHI practices at the law firm of Hemenway & Barnes LLP in Boston. Donna concentrates her practice in the areas of real estate, probate, business, and appellate litigation. She regularly litigates boundary, easement, partition, and zoning disputes; will, trust, and estate disputes; guardianships and conservatorships; breach of contract matters; and state and federal appeals. Prior to joining Hemenway & Barnes, Donna was a litigator at Ropes & Gray LLP, handling complex business litigation disputes in state and federal courts across the country. In addition, Donna worked as a staff attorney at Volunteer Lawyers Project in Boston, representing low-income clients in a range of family law and guardianship matters.

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Thursday, July 21, 2022
12:00 noon–1:00 pm
Program Number: 2220220WBC

REBROADCAST

Friday, August 5, 2022
9:00 am–10:00 am
Program Number: 2220220RBC

REBROADCAST

Monday, August 15, 2022
3:00 pm–4:00 pm
Program Number: 2220220RB1

ON DEMAND WEBCAST

View after Monday, August 15, 2022
Program Number: 2220220WBA

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