

When & How to Use Nominee Trusts in Estate Planning

Protecting privacy and effectuating estate planning goals involving real estate transfers

Nominee trusts are often used in the context of real estate transfers, primarily to protect the privacy of the parties involved and effectuate estate planning goals. Learn what a nominee trust is and how and why they are used in real estate transfers. Hear the speakers review how nominee trusts are structured and discuss important factors to consider when drafting these types of trusts on behalf of your clients. They also discuss real estate title issues encountered when utilizing nominee trusts, explore the use of trustee certificates as an alternative to recording a nominee trust, and conclude by highlighting some of the basic traps for the unwary when attorneys utilize nominee trusts in their practice.

Agenda

- What Are Nominee Trusts?
- Why and How Are Nominee Trusts Utilized?
- Nuts and Bolts of Drafting Nominee Trusts
- Title Requirements for Real Estate Transfers to a Nominee Trust
- Trustee Certificates
- Traps for the Unwary
- “Ask the Experts” Q&A Session

Faculty

Laurel M. Millette, Esq., *Transitions Law LLC, Concord*

Kristin A. Monaco, Esq., *Nigro, Pettepit & Lucas LLP, Newburyport*



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Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Thursday, September 29, 2022
9:30 am–10:30 am
Program Number: 2230039WBC

REBROADCAST CC

Friday, October 14, 2022
12:00 noon–1:00 pm
Program Number: 2230039RBC

REBROADCAST CC

Monday, October 24, 2022
3:00 pm–4:00 pm
Program Number: 2230039RB1

ON DEMAND WEBCAST CC

View after Monday, October 24, 2022
Program Number: 2230039WBA

Tuition (includes written materials)

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