

24th Annual Estate Planning Conference 2023

Estate planning, trust administration and fiduciary litigation all in one Conference!

Join estate planning practitioners, fiduciary counsel, fiduciary litigators, and representatives from the Probate and Family Court as we return in person at this year's *24th Annual Estate Planning Conference 2023!* The *Conference* distills the key issues, new developments, court trends, and practice tips you need to know about for the upcoming year.

Agenda

- **Current Trends in Charitable Planning:** Panelists discuss trends in charitable planning in recent years, as well as provide a refresher of some tried and true charitable planning techniques.
- **Estate Planning in a High Interest Rate and Volatile Market Environment:** Interest rates increased dramatically in 2022 after more than a decade of extraordinarily low rates. In addition, securities markets have seen increased volatility in the last year. This panel discusses estate planning in this “new” economic environment, and highlights some of the techniques that may become popular again as rates and market volatility increase.
- **Featured Forum: The MUPC—Reflections after the First Decade:** Join our panelists from the Probate and Family Court and the private bar for a look back at the last decade under the Massachusetts Uniform Probate Code and a glimpse into the future. We explore the best aspects of the statute from the court’s and practitioners’ perspectives, as well as what improvements can be made to further streamline and simplify the probate process.
- **Dispute Resolution:** Seasoned fiduciary and probate litigators discuss best practices and advice for resolving probate and trust disputes through various means of alternative dispute resolution.

Faculty

- Suma V. Nair, Esq., *Fiduciary Trust Company, Boston, Cochair*
 Marshall D. Senterfitt, Esq., *Goulston & Storrs, PC, Boston, Cochair*
 Kristin T. Abati, Esq., *Choate Hall & Stewart LLP, Boston*
 Brad Bedingfield, Esq., *Hemenway & Barnes LLP, Boston*
 Cameron Casey, Esq., *Ropes & Gray LLP, Boston*
 Pamela A. Casey-O'Brien, *Register, Essex Probate and Family Court, Commonwealth of Massachusetts*
 James J. Casiello, Jr., Esq., *Goulston & Storrs, PC, Boston*
 Tara E. DeCristofaro, Esq., *Register, Middlesex Probate and Family Court, Commonwealth of Massachusetts*
 Matthew R. Hillery, Esq., *Goulston & Storrs, PC, Boston*
 Jillian B. Hirsch, Esq., *Hirsch Law LLC, Newton*
 Joseph D. Kropp, Esq., *Gilmore, Rees & Carlson, PC, Wellesley Hills*
 Renat V. Lumpau, Esq., *Choate Hall & Stewart LLP, Boston*
 Evelyn J. Patsos, Esq., *Deputy Legal Counsel, Probate and Family Court, Commonwealth of Massachusetts*
 Tamara L. Sturges, Esq., *Egleson & Sturges LLC, Belmont*



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Dates & Locations

Register at www.mcle.org

BOSTON

Friday, April 28, 2023
 9:30 am–4:30 pm
 MCLE Conference Center
 10 Winter Place, via Winter Street
 Program Number: 2230139P01

LIVE WEBCAST

Friday, April 28, 2023
 9:30 am–4:30 pm
 Program Number: 2230139WBC

REBROADCAST

Monday, May 15, 2023
 9:30 am–4:30 pm
 Program Number: 2230139RBC

REBROADCAST

Tuesday, May 23, 2023
 9:30 am–4:30 pm
 Program Number: 2230139RB1

ON DEMAND WEBCAST

View after Tuesday, May 23, 2023
 Program Number: 2230139WBA

Tuition *(includes written materials)*

- \$275
- \$245.50 MCLE Sponsor Members
- \$137.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

The materials for this program are available online only and 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 and audio and videorecordings of this program.

CLE Credits

Earn up to 6 CLE credits