

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., *Verrill Dana LLP, Boston*, Cochair; Julie E. Braverman-Bruno, Esq., *Schmidt & Federico, PC, Boston*; Darian M. Butcher, Esq., *Butcher Law LLC, Boston*; Pamela Casey-O'Brien, *Register of Probate, Essex Probate and Family Court, Commonwealth of Massachusetts*; 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*; Ryan P. McManus, Esq., *Hemenway & Barnes LLP, Boston*; Catherine Olender Neijstrom, Esq., *Gilmore, Rees & Carlson, PC, Wellesley*; Heather 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

Monday, May 1, &
Tuesday, May 2, 2023
9:30 am–4:30 pm
Program Number: 2230143WBC

REBROADCAST

Tuesday, May 16, &
Wednesday, May 17, 2023
9:30 am–4:30 pm
Program Number: 2230143RBC

REBROADCAST

Wednesday, May 24, &
Thursday, May 25, 2023
9:30 am–4:30 pm
Program Number: 2230143RB1

ON DEMAND WEBCAST

View after Thursday, May 25, 2023
Program Number: 2230143WBA

Tuition *(includes written materials)*

- \$275
- \$247.50 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 include MCLE's *Massachusetts Probate Manual*, 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 and audio and videorecordings of this program.

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