

How to Structure Revocable Living Trusts

Understand the trust structure, language, and administration considerations that best suit life's changing scenarios

A revocable living trust is typically the central document of an estate plan, so being able to counsel clients as to the best structure for their specific circumstances is an important skill. Clients look to their attorney for guidance on how best to implement their wishes with respect to the disposition of their property without creating an administrative mess.

This program gives you the essential foundational knowledge and understanding that you need to effectively structure a revocable living trust for a variety of client scenarios. In addition to providing information on advising clients and drafting options, the expert panelists examine revocable living trusts from a trust administration standpoint to flag what works and what doesn't work. Hone your craft at MCLE with expert guidance!

Agenda

- Overview of Massachusetts Estate Tax and Federal Estate, Gift, and GST Tax Laws
- Overview of Basic Trust Terminology
- Provisions While Grantor Is Living
- Structure for Surviving Spouse—Credit Shelter Trust and Marital Trust
- Structure for Children and More Remote Descendants—Creditor Protection Considerations
- Trustee Selection
- Trustee Guidance v. Distribution Limitations/Restrictions
- Retirement Benefit Provisions
- Miscellaneous Provisions Integral to Trust Administration
- Trust Funding
- “Ask the Experts” Q&A Session

Faculty

Pamela L. Halter, J.D., LL.M., *Chief Fiduciary Officer, Howland Capital Management, Inc, Boston*,
Chair

Dara Lynn S. Freytag, Esq., *Tarlow, Breed, Hart & Rodgers, PC, Boston*

James W. Murphy, J.D., CFP, *Northeast Investment Management, Inc, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Friday, May 19, 2023

9:00 am–12:00 noon

Program Number: 2230147WBC

REBROADCAST

Monday, June 5, 2023

2:00 pm–5:00 pm

Program Number: 2230147RBC

REBROADCAST

Tuesday, June 13, 2023

9:30 am–12:30 pm

Program Number: 2230147RB1

ON DEMAND WEBCAST

View after Tuesday, June 13, 2023

Program Number: 2230147WBA

Tuition *(includes written materials)*

- \$245
- \$220.50 MCLE Sponsor Members
- \$122.50 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.

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