SEMINAR

Estate Planning: MCLE BasicsPlus!®

Developing a plan for the intermediate estate

A successful estate planning practice requires knowledge of federal and state statutes, rulings, and case law on a variety of substantive areas including taxation, trust, will, and property law. You must also possess finely tuned interview skills, as well as the ability to elicit and effectively use a substantial body of financial and personal data for each client.

This program gives you an overview of planning for a modest estate and the in-depth knowledge you need to plan for a variety of estate matters and effectively run your practice. The faculty focus on the practical application of the law and skills involved in planning an estate value of less than $2,000,000, although concerns that arise in larger estates are also covered. You learn the impact of both the Massachusetts and the federal estate tax exemptions. You also get advice on preparing wills, trusts, health care proxies, and powers of attorney based on your client's financial situation.

Agenda

- Initial Steps, Fundamentals, and Estate Planning Documents
- Medicaid and Long-Term Care Planning
- Fiduciary Income Tax Planning
- Planning with Life Insurance
- Estate, Gift, and GST Tax Planning
- Business Succession Planning
- Post-Mortem Planning
- Charitable Planning
- Ethics Hypotheticals
- "Ask the Experts" Q&A Session

Faculty

Katherine M. Sheehan, J.D., *Managing Director & Fiduciary Advisor, SVB Private Bank, Boston*, Chair

Patricia C. D'Agostino, Esq., *Margolis Bloom & D'Agostino, Wellesley*

Brian J. DesRosiers, Esq., *DesRosiers & Tierney LLC, Boston*

Kelly J. Guarino, Esq. V*ice President & Trust Counsel, Fiduciary Trust Company, Boston*

Amy R. Lonergan, Esq., *Day Pitney LLP, Boston*

Heidi A. Seely, Esq., *Day Pitney LLP, Boston*

James M. Tierney, Esq., CPA, LL.M., *DesRosiers & Tierney LLC, Duxbury*

Christopher A. Voukides, Esq., *Day Pitney LLP, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST
Monday, May 22, &
Tuesday, May 23, 2023
9:30 am–4:30 pm
Program Number: 2230211WBC

REBROADCAST CC
Tuesday, June 6, &
Wednesday, June 7, 2023
9:30 am–4:30 pm
Program Number: 2230211RBC

REBROADCAST CC
Wednesday, June 14, &
Thursday, June 15, 2023
9:30 am–4:30 pm
Program Number: 2230211RB1

ON DEMAND WEBCAST CC
View after Thursday, June 15, 2023
Program Number: 2230211WBA

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 *A Practical Guide to Estate Planning in Massachusetts*, 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.

CLE Credits

Earn up to 12 CLE credits

Including up to 1 ethics credit