

25th Annual Estate Planning Conference 2024

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

Join estate planning practitioners, fiduciary counsel, and fiduciary litigators as we celebrate this year's *25th Annual Estate Planning Conference 2024*. The *Conference* distills the key issues, new developments, court trends, and practice tips you need to know about for the upcoming year. We look forward to seeing you there!

Agenda

- **Focus on Ethics—Identifying and Resolving Ethical Issues in Estate Planning, Estate and Trust Administration, and Fiduciary Litigation:** Join our panelists for a discussion about the importance of managing ethical issues in all phases of planning, administration, and litigation. Navigating complicated family relationships, unrepresented constituents, clients with questionable capacity, and joint representations present estate planners and litigators with a host of potential ethical issues. Our experts discuss real world examples (and take audience questions) to illustrate best practices for managing and solving difficult ethical issues in a way that protects clients and lawyers.
- **Just Because You Can Doesn't Mean You Should:** Our panelists discuss typical provisions that are often included in estate planning documents but that might not be appropriate in every case. These may include so-called "boilerplate" provisions, but could also include meticulously crafted language meant to address particular concerns of the testator or settlor that ultimately are difficult or even impossible to administer.
- **Common Tax Reporting Tips and Traps:** Even the best estate planning ideas and negotiated settlements can ultimately fail if they are not accompanied by careful consideration of tax consequences and accurate and timely tax reporting. Join our seasoned panelists for a discussion of common mistakes made in fiduciary, gift, and estate tax reporting, and how to prevent, identify, and even resolve them after the fact.
- **Fiduciary Conundrums—Foreseeing, Avoiding, and Managing Difficult Situations in Trust and Estate Administration:** Our panelists discuss recurring family patterns and circumstances that can lead to difficult and often costly administration of trusts and estates, as well as strategies for identifying potential issues before they become current problems, mitigating conflicts and finding your way out of conundrums quickly and efficiently.

Faculty

Suma V. Nair, JD, *Chief Fiduciary Officer, Fiduciary Trust Company, Boston, Cochair*

Marshall D. Senterfitt, Esq., *Holland & Knight LLP, Boston, Cochair*

Sarah M. Allen, JD, LLM, *Rice, Heard & Bigelow, Inc., Boston*

Marc J. Bloostein, Esq., *Choate Hall & Stewart LLP, Boston*

Eric P. Hayes, Esq., *Goodwin Procter LLP, Boston*

Matthew R. Hillery, Esq., *Goulston & Storrs, PC, Boston*

Jillian B. Hirsch, Esq., *Hirsch Law LLC, Newton*

Anne Katsas, JD, *Vice President & Trust Counsel, Fiduciary Trust Company, Boston*

Renat V. Lumpau, Esq., *Choate Hall & Stewart LLP, Boston*

Sahri Zeger, JD, MBA, *CohnReznick LLP, Cambridge*

Dates & Locations

Register at www.mcle.org

BOSTON

Tuesday, April 23, 2024

9:30 am–4:30 pm

MCLE Conference Center

10 Winter Place, via Winter Street

Program # 2240184P01

LIVE WEBCAST

Tuesday, April 23, 2024

9:30 am–4:30 pm

Program # 2240184WBC

REBROADCAST

Wednesday, May 8, 2024

9:30 am–4:30 pm

Program # 2240184RB1

REBROADCAST

Thursday, May 16, 2024

9:30 am–4:30 pm

Program # 2240184RB2

ON DEMAND WEBCAST

View after Thursday, May 16, 2024

Program # 2240184WBA

Tuition *(includes written materials)*

- \$275
- \$247.50 MCLE 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

Massachusetts Probate Law Sourcebook & Citor ebook, plus speaker materials

- E-materials link emailed upon registration
- Complimentary print book for in-person registrants
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 6 CLE credits

Including up to 1 ethics credit