

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., *Verrill Dana LLP, 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., *Mirick, O'Connell, DeMallie & Lougee LLP, Worcester*; 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., *Holland & Knight LLP, 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

Tuesday, May 7, &
Wednesday, May 8, 2024
9:30 am–4:30 pm
Program # 2240187WBC

REBROADCAST

Wednesday, May 22, &
Thursday, May 23, 2024
9:30 am–4:30 pm
Program # 2240187RB1

REBROADCAST

Thursday, June 6, &
Friday, June 7, 2024
9:30 am–4:30 pm
Program # 2240187RB2

ON DEMAND WEBCAST

View after Friday, June 7, 2024
Program # 2240187WBA

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 Manual ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

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