

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., LL.M., *Tarlow, Breed, Hart & Rodgers, PC, Boston*

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

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, April 30, 2024
9:30 am–12:30 pm
Program # 2240190WBC

REBROADCAST

Wednesday, May 15, 2024
1:00 pm–4:00 pm
Program # 2240190RB1

REBROADCAST

Thursday, May 23, 2024
9:00 am–12:00 pm
Program # 2240190RB2

ON DEMAND WEBCAST

View after Thursday, May 23, 2024
Program # 2240190WBA

Tuition *(includes written materials)*

- \$245
- \$220.50 MCLE 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

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

CLE Credits

Earn up to 3 CLE credits



Subscribe to the MCLE OnlinePass®

for instant access to this program and everything else MCLE offers online.

Learn more at www.mcle.org