ONLINE SEMINAR

Estate Administration Client Checklist

Navigating the estate administration process with the client experience in mind

Advising a client through the estate administration process requires a solid understanding of probate, tax, and trust laws, as well as empathy, attention-to-detail, and responsiveness. Sometimes the burden of the estate administration process can be eased with some strategic planning before death. Even the most thorough estate plans can, however, still have surprises that require an unanticipated probate proceeding.

When helping clients through the legal responsibilities that follow a loved one's death, estate planning attorneys are issue-spotting, advocating, and explaining. Internal and external checklists are essential to mitigate risk, to meet the demands of an estate administration practice, and to ensure the client's experience exceeds expectations. Using checklists and samples, this seminar provides practical advice to help estate planning attorneys navigate the estate administration process with the client experience in mind.

Agenda

- **Preparing for the First Meeting**
  - Internal Checklists: Presentation documents; Agenda
  - External Checklists: Engagement letter; Preliminary information request form
- **Mapping the Estate**
  - Internal Checklists: Information gathering; Internal tracking, assignment of tasks and calendaring; Issue-spotting
  - External Checklists: Information gathering; Detailed estate administration memo and meeting(s)
- **Keeping Updated**
  - Internal Checklists: Estate status reviews; Ongoing tracking probate, creditors, tax compliance, and implementation
  - External Checklists: Client-friendly status checklist; Managing client involvement; Assisting client with implementation; Meetings and communications
- **Crossing the Finish Line**
  - Internal Checklists: Closing memo
  - External Checklists: Explanatory memo and meeting(s); Ongoing advice

Faculty

Jennifer A. Civitella Hilario, Esq., *Attorney at Law, JC Hilario, PC, Cambridge*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST
Thursday, March 7, 2024
9:30 am–10:30 am
Program # 2240197WBC

REBROADCAST CC
Friday, March 22, 2024
12:00 pm–1:00 pm
Program # 2240197RB1

REBROADCAST CC
Monday, April 1, 2024
3:00 pm–4:00 pm
Program # 2240197RB2

ON DEMAND WEBCAST CC
View after Monday, April 1, 2024
Program # 2240197WBA

Tuition *(includes written materials)*

- $145
- $130.50 MCLE Members
- $72.50 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

Earn up to 1 CLE credit