

Handling & Disposing of Tangible Assets

Proper planning for tangible personal property

This often-overlooked aspect of estate planning needs careful consideration to avoid bickering family members fighting over family heirlooms. Be sure your clients have properly planned the disposition of their tangible personal property for their loved ones, whether via the use of a Personal Property Memorandum or otherwise. Learn how to navigate this frequently forgotten estate planning process.

Agenda

- Tangible Assets Defined
- G.L. c. 190B, § 2-513
- Tangible Personal Property Memorandum
 - Formalities for validity
 - Contents
- Planning for Valuable Tangible Assets
- Planning for Emotional Value
- Expenses: Covering Shipping and Storage of Personal Property
- Tax Consequences
 - Lifetime gifts
 - Sale of tangible assets
- Pitfalls for the Unwary

Faculty

Shani Rea Collymore, Esq., *Cody, Cody & McCarthy LLC, Quincy*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Wednesday, April 3, 2024
9:00 am–10:00 am
Program # 2240198WBC

REBROADCAST

Thursday, April 18, 2024
12:00 pm–1:00 pm
Program # 2240198RB1

REBROADCAST

Friday, April 26, 2024
9:00 am–10:00 am
Program # 2240198RB2

ON DEMAND WEBCAST

View after Friday, April 26, 2024
Program # 2240198WBA

Tuition *(includes written materials)*

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Materials

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

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