ONLINE SEMINAR

Estate Planning: MCLE BasicsPlus!®

Learn the law and acquire skills to be successful

Estate Planning: MCLE BasicsPlus! gives practitioners a solid foundation in the skill set and tools necessary to establish a successful estate planning practice. The program focuses on practical application of the law involved in planning for a modest estate, although it also introduces concerns that arise in larger or more complex estates. You get advice on how to prepare wills, trusts, health care proxies, and powers of attorney based on your client's financial situation. You gain tips on how to conduct client meetings and how to navigate common ethical issues in estate planning. You also get an introduction to a variety of issues that are essential for an estate planner, including transfer tax and elder law issues. You leave this program with a solid grounding in estate planning and the ability to jump-start your practice.

Agenda

- Fundamentals of Estate Planning
- Initial Steps with Clients, Including Engagement Letters and Information Gathering
- Fundamentals of Trusts
- Income and Transfer Taxes Issues
- Marital Deduction Planning
- Planning for Retirement Benefits
- Ethical Issues in Estate Planning
- Elder Law Issue Spotting, Medicaid Planning, and Care Manager's Perspective
- Post-Mortem Planning
- "Ask the Experts" Q&A Session

Faculty

Aimee Fukuchi Bryant, Esq., *Fiduciary Trust Company, Boston*, Cochair
Nikki Marie Sherwood, Esq., *Nutter McClennen & Fish LLP, Boston*, Cochair
Paul Cathcart, Jr., Esq., *Hemenway & Barnes LLP, Boston*
Heather B. Cheney, Esq., *BNY Mellon Wealth Management, Boston*
Jessica A. Demmerly, Esq., *Rubin and Rudman LLP, Boston*
Vaishali Goyal, Esq., *Goulston & Storrs, PC, Boston*
Sarah F. Hartline, Esq., *Margolis Bloom & D'Agostino LLP, Wellesley Hills*
Kristin M. Kelley, CPA, MST, KLR, *Private Client Services Group, Waltham*
Jennifer M. Lo, Esq., *Seegel Lipshutz Lo & Martin LLP, Wellesley Hills*
Laurel M. Millette, Esq., *Transitions Law LLC, Concord*
Kristin A. Monaco, Esq., *Nigro, Pettepit & Lucas LLP, Newburyport*
Anna L. Pollard, LICSW, C-ASWCM, *Director of Clinical Services/Life Care Manager, LifeCare Advocates, Newton Center*
John H. Ramsey, Esq., *Goulston & Storrs, PC, Boston*
Michael J. Rossi, Esq., *Conn Kavanaugh Rosenthal Peisch & Ford LLP, Boston*
Jennifer D. Taddeo, Esq., *Estatewise Advisory, Franklin*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST
Thursday, December 14, &
Friday, December 15, 2023
9:30 am–4:30 pm
Program # 2240060WBC

REBROADCAST CC
Tuesday, January 2, &
Wednesday, January 3, 2024
9:30 am–4:30 pm
Program # 2240060RB1

REBROADCAST CC
Wednesday, January 10, &
Thursday, January 11, 2024
9:30 am–4:30 pm
Program # 2240060RB2

ON DEMAND WEBCAST CC
View after Thursday, January 11, 2024
Program # 2240060WBA

Tuition *(includes written materials)*

- $295
- $265.50 MCLE Sponsor Members
- $147.50 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

A Practical Guide to Estate Planning in Massachusetts ebook, plus speaker materials

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

CLE Credits

Earn up to 12 CLE credits including up to 1 ethics credit