

Trusts in Real Estate

Transferring property to and from trusts

The process of transferring property into or out of trusts can be complicated and confusing. Our panel of experts demystifies the trust transfer process. Topics include the basics of transferring property into and out of trusts, identifying different types of trusts and the implications for transfer, addressing major title issues that arise when transferring property to and from trusts, and recognizing what documentation is needed to successfully complete the transfer. In addition, the panel discusses best practices, traps for the unwary, and common issues that arise at Land Court in this context.

Agenda

- How to Transfer Property into and Out of Inter Vivos, Testamentary, and Nominee Trusts
- Major Title Issues That Arise When Transferring Property to or from a Trust
- What Documentation Is Necessary to Transfer Property to or from a Trust (i.e., Use and Filing of Trustee Certificates; When to File a Complaint Subsequent to Registration)
- Best Practices, Traps for the Unwary, and Common Trust-Related Issues That Arise at Land Court
- “Ask the Experts” Q&A Session

Faculty

Luke C. Bean, Esq., *Rico, Murphy, Diamond & Bean LLP, Natick*, Cochair

Donna A. Mizrahi, Esq., *Hemenway & Barnes LLP, Boston*, Cochair

Annelle E. Benson, Esq., *Senior Underwriting Counsel, First American Title Insurance Company, Worcester*

Christina T. Geaney, Esq., *Chief Title Examiner, Land Court, Commonwealth of Massachusetts*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Monday, May 20, 2024

1:00 pm–4:00 pm

Program # 2240154WBC

REBROADCAST

Tuesday, June 4, 2024

9:00 am–12:00 pm

Program # 2240154RB1

REBROADCAST

Wednesday, June 12, 2024

9:30 am–12:30 pm

Program # 2240154RB2

ON DEMAND WEBCAST

View after Wednesday, June 12, 2024

Program # 2240154WBA

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
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Materials

Understanding and Using Trusts ebook, plus speaker materials

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

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