

# Trusts: Briefings & eBooks Bundle

4 webcast programs + 3 value-added eBooks = core fluency

Do you or your clients have questions about trusts? This curated bundle of 9 hours of fast-paced webcast programming paired with MCLE's comprehensive e-publications, *Understanding and Using Trusts*, *Drafting Wills and Trusts in Massachusetts*, and *Drafting Irrevocable Trusts in Massachusetts*, gives you a solid foundation in trust law. Set your own schedule, expand your skill set, and advance your practice with confidence.

## Webcast Briefings

- **Understanding & Using Trusts: MCLE BasicsPlus!®:**
  - Basic Estate Planning: Probate v. non-probate property; Intervivos v. testamentary; Family issues, dispositive and non-tax aspects; Transfer tax v. income tax issues
  - Transfer Taxes: Gift tax, estate tax, and GST tax
  - Introduction to Trusts: What is a trust? Choice of trustee; Funded v. unfunded revocable trusts; Fiduciary responsibility and liability; Ethical issues
  - Marital Deduction Planning and Funding Trusts: Requirements for marital deduction; Administering a marital trust
  - Distributions from Trusts: Settlor's intent; Determining beneficiaries; Mandatory v. discretionary
  - Charitable Trusts: Intervivos v. testamentary; Income and estate tax advantages; Splitting trusts at death
  - Alphabet Soup of Other Trusts: Brief description of GRATs, LATs, and IDGTs; Income and estate tax advantages and disadvantages
  - Medicaid Planning and Elder Law Issue Spotting
- **How to Make Directed Trusts Work:** Types of directed trusts in Massachusetts (review and discussion of G.L. c. 203E, § 808); New Hampshire (review and compare RSA § 564-B:7-711); Picking the right law for your directed trust and evaluating whether you can draft for RSA § 564-B:7-711 without being a New Hampshire trust
- **When & How to Use Nominee Trusts in Estate Planning:** What are nominee trusts? Why and how are nominee trusts utilized? Drafting nominee trusts; Title requirements for real estate transfers to a nominee trust; Trustee certificates; Traps for the unwary
- **How to Terminate a Trust:** Non-judicial options for terminating a trust; Petition to revoke non-charitable trust (G.L. c. 203E, § 411); Unanticipated circumstances (G.L. c. 203E, § 412); Uneconomic trust (G.L. c. 203E, § 414); Reformation to correct mistakes (G.L. c. 203E, § 415); Petition to terminate; Protecting the trustee from future liability

## Unparalleled Expertise—Speakers & Authors

- Top-notch Guidance—from the Best in the Practice
- Practical Insight You Can Trust



## Subscribe to the MCLE OnlinePass®

for instant access to this program and everything else MCLE offers online.  
Learn more at [www.mcle.org](http://www.mcle.org)

## Dates & Location

Register at [www.mcle.org](http://www.mcle.org)

### REBROADCAST

Tuesday, June 11, 2024  
9:00 am–4:00 pm  
& Wednesday, June 12, 2024  
9:00 am–12:00 pm  
Program # 2240199RB1

### REBROADCAST

Wednesday, July 17, 2024  
9:00 am–4:00 pm  
& Thursday, July 18, 2024  
9:00 am–12:00 pm  
Program # 2240199RB2

### REBROADCAST

Thursday, August 15, 2024  
9:00 am–4:00 pm  
& Friday, August 16, 2024  
9:00 am–12:00 pm  
Program # 2240199RBC

## 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](mailto:scholarships@mcle.org).

## Materials

*Understanding and Using Trusts*, *Drafting Wills and Trusts in Massachusetts*, and *Drafting Irrevocable Trusts in Massachusetts* eBooks, plus speaker materials

- E-materials link, transcripts & videorecordings emailed upon registration

## CLE Credits

Earn up to 9 CLE credits