

Understanding & Using Trusts: MCLE BasicsPlus!®

A thorough foundation in every aspect of the trust process

Every estate planner knows that trusts are an essential and widely used estate planning tool, but not all estate planners have the in-depth understanding of trusts they really need in order to serve their clients effectively. A thorough understanding of trust formation and administration is critical across many areas of specialization, including tax, real estate, finance, litigation, elder law, and nonprofit law. It is equally important when advising clients to understand the technical rules governing trusts and how Massachusetts statutes and common law may affect both trustees and beneficial interest holders.

The expert faculty guide you step-by-step through the life of a trust, from beginning the trust to ongoing administration to wrapping up. They analyze the latest updates and provide valuable advice on key, cutting-edge issues. You leave with a thorough overview of how trusts work and how to use them to achieve your clients' goals.

Agenda

- Basic Estate Planning; Probate; Family Issues
- Trust Overview
- Duties and Powers of a Trustee
- Transfer Taxes: Gift, Estate, GST
- Marital Deduction Planning: Requirements and Administration
- Trust Funding: Funding Intervivos Trusts and Trust Splitting at Death
- Charitable Trusts
- Advanced Strategies (GRATs, SLATs, IDGTs); Income and Estate Tax Advantages and Disadvantages
- Medicaid Planning and Elder Law Issue Spotting
- "Ask the Experts" Q&A Session

Faculty

Jennifer Z. Flanagan, Esq., *Mirick, O'Connell, DeMallie & Lougee LLP, Worcester*, Chair

Christine Boutin, Esq., *Mirick, O'Connell, DeMallie & Lougee LLP, Worcester*

Sean T. Donovan, Esq., *The Northern Trust Company, Boston*

Kristin N.G. Dzialo, Esq., *Rubin and Rudman LLP, Boston*

Annette K. Eaton, Esq., *The Northern Trust Company, Boston*

Elizabeth V. Newton, Esq., *Mirick, O'Connell, DeMallie & Lougee LLP, Worcester*

Molly R. Soiffer, Esq., *Bove & Langa, PC, Boston*

Rachel M. Wassel, Esq., *Ruberto, Israel & Weiner, PC, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Thursday, September 26, 2024

9:30 am–4:30 pm

Program # 2250068WBC

REBROADCAST

Friday, October 18, 2024

9:30 am–4:30 pm

Program # 2250068RB1

REBROADCAST

Monday, October 28, 2024

9:30 am–4:30 pm

Program # 2250068RB2

ON DEMAND WEBCAST

View after Monday, October 28, 2024

Program # 2250068WBA

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.

Materials

Understanding and Using Trusts ebook, plus speaker materials

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

CLE Credits

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