

Basic Estate Planning and Administration

Drafting tips and problem-solving for basic estate planning and administration, including:

- ◆ Potential pitfalls in drafting estate planning documents
- ◆ Gifting—pros, cons, and formulas
- ◆ Petitions for instructions and settlement agreements
- ◆ Fiduciary duties and risks
- ◆ Representing clients with diminished mental capacity

Receive basic estate planning forms on CD as part of the course materials!

Includes
forms
on CD!

*Cosponsored by the Estate Planning
and Administration Section*

Friday, June 25, 2010
9 a.m.—4:30 p.m.

Oregon Convention Center
Portland, Oregon

6 General CLE or Practical Skills credits
and .5 Ethics credit



Basic Estate Planning and Administration

Cosponsored by the Estate Planning and Administration Section

Friday, June 25, 2010

6 General CLE or Practical Skills credits and .5 Ethics credit

Oregon Convention Center
777 N.E. Martin Luther King Jr. Blvd.
Portland, Oregon

THIS PRACTICAL, PRACTICE-ORIENTED SEMINAR TACKLES A NUMBER of issues found in basic estate planning and administration. From customizing standard forms for your clients' specific needs to representing clients with diminished capacity, our faculty members will share their expertise and experience so you have the most relevant information for your clients. Examine select real property issues in basic estate administration. Review petitions for instructions and settlement agreements, as well as fiduciary duties and risks associated with trusts and estates. A look at key issues in Washington estate administration includes applying community property law to the administration of estates. Learn to recognize in your clients clues that point to cognitive impairment and undue influence. Get the latest on the current state of the gift tax, as well as deathbed gifting tips and traps.

Whether you are new to estate planning or simply seeking a refresher course, this seminar provides a sound foundation for your practice.

Estate Planning and Administration Section members receive a \$20 registration discount.

This seminar is also available as a live webcast—click here to register

Register online at www.osbar.org, by using this form, or by calling the OSB CLE Service Center at (503) 431-6413, toll-free in Oregon at 1-800-452-8260, ext. 413. For a full listing of OSB CLE seminars, please visit www.osbarcle.org.

Video Replays

A video of this seminar will be shown at the following locations if a minimum of three viewers register at least seven days prior to the replay date. You can check the status of the replay at the OSB CLE Seminars website, www.osbarcle.org. Select the seminar date and title from the "CLE Calendar" tab. A color-coded system will indicate if the replay is taking place; all locations will be updated by the Tuesday preceding the replay date.

- ◆ **Astoria**
Friday, July 23
Di Bartolomeo Law Office
1139 Exchange St.
- ◆ **Bend**
Friday, July 16
Miller Nash LLP
1567 S.W. Chandler Ave.
Suite 204
- ◆ **Coos Bay**
Friday, July 16
Daniel M. Hinrichs PC
590 Commercial Ave.
- ◆ **Eugene**
Friday, July 23
Gaydos Churnside & Balthrop PC
440 E. Broadway, Suite 300
- ◆ **Grants Pass**
Thursday, July 15
Josephine County Courthouse
Room 222
N.W. 6th and "C" Streets
- ◆ **Hood River**
Friday, July 16
Wyers Haskell Davies & Dunn PC
216 Columbia
- ◆ **Klamath Falls**
Friday, July 16
Boivin Uerlings & Dilaconi PC
803 Main St., Suite 201
- ◆ **LaGrande**
Friday, July 16
Baum Smith & Eyre LLC
1902 Fourth St.
- ◆ **Medford**
Friday, July 23
Frohnmayr Deatherage
2592 E. Barnett Rd.
- ◆ **Newport**
Friday, July 23
Macpherson Gintner & Diaz
423 North Coast Highway
- ◆ **Pendleton**
Friday, July 23
Mautz Baum & O'Hanlon LLP
101 S.E. Byers Ave.
- ◆ **Redmond**
Friday, July 23
Bryant Emerson & Fitch
888 S.W. Evergreen
- ◆ **Roseburg**
Thursday, July 15
Douglas County Counsel's Office
Law Library, Room 319
1036 S.E. Douglas
- ◆ **Salem**
Friday, July 16
The Vandermay Law Firm
2085 Commercial Street NE
- ◆ **Tigard**
Wednesday, July 21
Oregon State Bar Center
16037 S.W. Upper Boones Ferry Rd.
- ◆ **Vale**
Friday, July 16
Butler & Looney PC
292 Main St. S.

Basic Estate Planning and Administration—Friday, June 25, 2010

8:00 Registration

9:00 **Select Real Property Issues in Basic Estate Administration**

- ◆ Forms of vesting deed and legal effect
- ◆ Sales by trustees
- ◆ The benefit of title insurance—what it does and doesn't do

Robert E. Lowe, *WFG National Title Insurance Company, Lake Oswego*

9:30 **Petitions for Instructions and Settlement Agreements**

- ◆ Petitioning for instructions, declaratory judgments, or trust modifications in the probate court
- ◆ Attorney fees and settlement agreements in estate and trust disputes
- ◆ Avoiding unintended tax consequences in judgments and settlement agreements

Philip N. Jones, *Duffy Kekel LLP, Portland*

10:15 Break

10:30 **Fiduciary Duties and Risks**

- ◆ Complying with Uniform Trust Code reporting requirements
- ◆ Removal or resignation of a trustee or personal representative
- ◆ Partial and final distributions from trusts and estates

Holly N. Mitchell, *Duffy Kekel LLP, Portland*

11:15 **Key Issues in Washington Estate Administration**

- ◆ Nonintervention probate procedures
- ◆ Income and estate tax considerations
- ◆ Applying community property law to the administration of estates

T. Randall Grove, *Landerholm Memovich Lansverk & Whitesides PS, Vancouver*

Philip Baird Janney, *Landerholm Memovich Lansverk & Whitesides PS, Vancouver*

12:15 Lunch

(On your own, or you may purchase a plated lunch using the registration form)

1:15 **Representing Your Client Through Diminishing Mental Capacity**

- ◆ Cognitive impairment—memory and executive function
- ◆ Delirium, dementia, and psychotic disorders
- ◆ Clues to cognitive impairment and undue influence
- ◆ Attorney ethics when a client experiences diminished capacity
- ◆ Practical issues and pitfalls

Moderator: Chris L. Mullmann, *Oregon State Bar, Tigard*
Linda Ganzini, MD, MPH, *Oregon Health & Science University, Portland*

Stephen R. Owen, *Fitzwater Meyer LLP, Portland*

2:30 **Gifting in Today's Tax World: Loophole or Noose?**

- ◆ The current state of the gift tax
- ◆ Gifting and IT-1 filing: what's the rub?
- ◆ Deathbed gifting tips and traps
- ◆ Discounted gifting and opportunity shifting
- ◆ Gifting issues—pros, cons, and formulas

Jeffrey G. Moore, *Saalfeld Griggs PC, Salem*

3:15 Break

3:30 **Basic Estate Planning**

- ◆ Basic drafting
- ◆ Wills versus revocable living trusts
- ◆ Potential pitfalls in drafting estate planning documents

Warren C. Deras, *Attorney at Law, Portland*

Eric R. Foster, *Foster Denman LLP, Medford*

4:30 Adjourn

Section Planners:

- ◆ **Jay A. Boelter**, *Brownstein Rask Sweeney Kerr Grim DeSylvia & Hay LLP, Portland*
- ◆ **Susan A. Miller**, *Civil Enforcement Division, Oregon Department of Justice, Portland*
- ◆ **Holly N. Mitchell**, *Duffy Kekel LLP, Portland*
- ◆ **Jeffrey G. Moore**, *Saalfeld Griggs PC, Salem*
- ◆ **Jack Rounsefell**, *Attorney at Law, Gresham*
- ◆ **Eric J. Wieland**, *Samuels Yoelin Kantor Seymour & Spinrad LLP, Portland*

OSB CLE Seminars Attorney:

- ◆ **Karen D. Lee**, *klee@osbar.org, (503) 431-6382*

Basic Estate Planning and Administration—Friday, June 25, 2010

SEMINAR REGISTRATION

PORTLAND (Registration includes forms)

- \$175 OSB Member—Early registration
(received before noon, Monday, 6/21/10)..... \$ _____
- \$195 OSB Member—Regular registration
(received after noon, Monday, 6/21/10) \$ _____
- \$205 Non-OSB Member \$ _____
*Estate Planning and Administration Section
member discount—subtract \$20..... - _____*
- \$0 **2009–2010 Season Ticket** (Please register
by noon, Monday, 6/21/10, to guarantee a
seat and course materials. Season Ticket
registrations received after this time are
welcome and will be accommodated on a
space-available basis.)..... \$ _____
- \$0 50-year OSB members, Oregon judges and their
lawyer staff—please call the CLE Service Center
at (503) 431-6413, or toll-free in Oregon at
(800) 452-8260, ext. 413, to register.
- \$25 Lunch Vegetarian \$ _____

Course materials (please select one):

- \$0 USB flash drive version
- \$0 Printed version
- \$40 Both USB flash drive and printed version \$ _____
- TOTAL REGISTRATION FEES (BEP10) (782)..... \$ _____

B

VIDEO REPLAY (Registration includes forms)

(Please see video replay schedule on previous page.)

Location: _____

- \$175 Registration \$ _____
- \$155 Estate Planning and Administration Section
member \$ _____
- \$0 2009–2010 Season Ticket \$ _____
- \$0 50-year OSB members may attend free of
charge \$ _____
- \$0 50-year OSB members, Oregon judges and their
lawyer staff—please call the CLE Service Center
at (503) 431-6413, or toll-free in Oregon at
(800) 452-8260, ext. 413, to register.

Course materials (please select one):

- \$0 USB flash drive version
- \$0 Printed version
- \$40 Both USB flash drive and printed version \$ _____
- TOTAL REGISTRATION FEES (BEP10) (782)..... \$ _____

B

WEBCAST REGISTRATION

To register for the live webcast of this seminar, please [click here](#), or visit www.osbarcle.org and click on “Webcasts.” Use your Season Ticket for a 50% discount!

SEMINAR PRODUCT ORDERS

Seminar products will be available approximately two weeks after the live program.

- \$195 Audio CDs and course materials & forms
- USB flash drive (BEP10.KCDF)
- Printed book & forms CD (BEP10.KCD).... \$ _____
- \$325 DVDs and course materials & forms
- USB flash drive (BEP10.KDVF)
- Printed book & forms CD (BEP10.KDV).. \$ _____
- 2009–2010 Season Ticket No. _____
- discount—subtract 20% - _____
- Subtotal..... \$ _____
- \$65 Course materials & forms
- USB flash drive (BEP10.KFL)
- Printed book & forms CD (BEP10.KHB).. \$ _____
- 2009–2010 Season Ticket No. _____
- discount—subtract 30% - _____
- Subtotal..... \$ _____
- Shipping and handling fee..... \$ 7.00
- TOTAL ORDER..... \$ _____

B

For audiocassette and VHS formats, please call the CLE Service Center at 503-431-6413, or toll-free in Oregon at 1-800-452-8260, ext. 413.

DVD RENTALS

For additional viewers, please call 503-431-6351, or toll-free in Oregon at 1-800-452-8260, ext. 351.

- \$195 DVD rental and course materials & forms
- USB flash drive (BEP10.KDRF)
- Printed book & forms CD (BEP10.KDR).. \$ _____
- Subtotal..... \$ _____
- 2009–2010 Season Ticket No. _____
- DVD rental discount—subtract 30% - _____
- Subtotal..... \$ _____
- Shipping and handling fee..... \$ 7.00
- TOTAL ORDER..... \$ _____

B

GENERAL INFORMATION

QUESTIONS? Call the CLE Service Center at 503-431-6413, or toll-free in Oregon at 1-800-452-8260, ext. 413. For information about upcoming seminars, please visit the CLE Calendar at www.osbarcle.org.

CANCELLATIONS: Cancellation requests must be received at least 48 hours prior to the start of the seminar to qualify for a refund. Requests are accepted via phone, fax, or mail; please see “Four Ways to Register” for contact information. All cancellations are subject to a \$20 cancellation fee.

TUITION ASSISTANCE: Tuition assistance is available on the basis of financial need. Fax a request stating your financial situation to 503-968-4456 no later than one week before the seminar.

DIETARY RESTRICTIONS OR SPECIAL ACCOMMODATIONS:
Call 503-431-6351, or toll-free in Oregon, 1-800-452-8260, ext. 351.

Bar # _____ Name _____

Firm Name _____

Email _____ Phone _____ Fax _____

Address _____

City _____ State _____ Zip Code _____

PAYMENT OPTIONS

- Check Enclosed: Payable to Oregon State Bar
- Credit Card (VISA or MasterCard only)

All information below required when paying by credit card.

Credit Card Number _____ Expiration Date _____

Name on Credit Card (please print) _____

Credit Card Billing Address _____

City _____ State _____ Zip Code _____

Authorized Signature _____

FOUR WAYS TO REGISTER OR ORDER

Registrations and orders will not be processed without payment.

- ONLINE** at www.osbar.org.
- PHONE:** 503-431-6413, or toll-free in Oregon at 1-800-452-8260, ext. 413
- FAX with VISA or MasterCard number:** 503-968-4456
- MAIL with check:** Oregon State Bar, CLE Registration, P.O. Box 231935, Tigard, OR 97281-1935

© 2010 Oregon State Bar

Unauthorized recording of CLE seminars is prohibited.