Estate Planning & Administration

Administering the Basic Estate and Trust: Not So Basic Anymore

November 2011—5.75 General CLE or Practical Skills credits and 1 Ethics credit

ABE11.KCD	Audio CDs and course materials	$195
ABE11.KDV	DVDs and course materials	$325
ABE11.HB	Course materials	$65
ABE11.KDR	DVD rental and course materials (first person)	$195
ABE11.AVRT	DVD rental and course materials (each additional viewer)	$98

Administering a basic estate or trust is more challenging than the name implies. Whether you are new to estate planning or brushing up on your estate planning basics, our experts will help you understand vital aspects of estate and trust administration. Examine key trust administration issues, including fiduciary duties and determining whether probate is necessary. Learn the essence of trust repair and how to deal with virtual assets. Get practice tips for handling probate mediation and an overview of debtor-creditor issues such as processing creditors' claims in and out of probate and bankruptcy proceedings. Discover the impact of the new Oregon inheritance bill, and tackle legal ethics for estate planning lawyers. Cosponsored by the Estate Planning and Administration Section.

Administering the Taxable Estate

November 2009—6 General CLE credits and 1 Ethics credit

ATE09.KCD	Audio CDs and course materials	$195
ATE09.KDV	DVDs and course materials	$325
ATE09.HB	Course materials	$65
ATE09.KDR	DVD rental and course materials (first person)	$195
ATE09.AVRT	DVD rental and course materials (each additional viewer)	$98

Our faculty of estate planning experts can help you understand tax intricacies and twists when it comes to estate planning. Take a look at the Oregon inheritance tax, including how it is calculated, the impact of lifetime taxable gifts, and making Oregon elections. Discover income tax traps with the marital formula clause and drafting tips. Gain a unique perspective as a former IRS estate tax attorney explains "How to Mess Up an Estate Plan." A panel on fiduciary investing explores misconceptions about investing and managing assets in a volatile market, as well as Uniform Prudent Investor Act requirements and case law. Receive an update on recent relevant Oregon legislation and cases. To round out the topics, two ethics experts discuss the intersection of legal ethics and estate planning. Cosponsored by the Estate Planning and Administration Section.

Advanced Estate Planning (2010)

September 2010—5.75 General CLE credits and 1 Ethics credit

AEP10.KCD	Audio CDs and course materials	$195
AEP10.KDV	DVDs and course materials	$325
AEP10.HB	Course materials	$65
AEP10.KDR	DVD rental and course materials (first person)	$195
AEP10.AVRT	DVD rental and course materials (each additional viewer)	$98

This information-rich seminar is an ideal opportunity to hear about significant changes that will affect your clients. Experienced practitioners examine 2010 federal and state estate taxes, 2010 late-year planning strategies, and planning for 2011 and beyond. Take a look at how Oregon's elective share law is changing, and gain some simple asset protection techniques. Learn how to defend against an IRS attack on family entity planning and how to work with a valuation expert. Review common trust drafting errors and ethical considerations for estate planning lawyers. Cosponsored by the Estate Planning and Administration Section.

Advanced Estate Planning (2011)

June 2011—5.25 General CLE credits and 1 Ethics credit

AEP11.KCD	Audio CDs and course materials	$195
AEP11.KDV	DVDs and course materials	$325
AEP11.HB	Course materials	$65
AEP11.KDR	DVD rental and course materials (first person)	$195
AEP11.AVRT	DVD rental and course materials (each additional viewer)	$98

Here is a great opportunity to hear from industry experts and local practitioners on a variety of issues common to an estate planning and administration practice. Learn how thoughtful decisions can help your clients build and preserve their assets. Get the latest in trustee investing issues. Examine life insurance and its typical uses, including frequently seen problems and solutions. How to avoid a will or trust contest is discussed, as well as ethics issues faced by estate planning attorneys. Receive an update on recent Oregon legislative changes affecting estate planning. Cosponsored by the Estate Planning and Administration Section.

Basic Estate Planning and Administration

June 2010—6 General CLE or Practical Skills credits and .5 Ethics credit

BEP10.KCDF	Audio CDs and course materials & forms on USB flash drive	$195
BEP10.KCD	Audio CDs and printed course materials & forms CD	$195
BEP10.KDVF	DVDs and course materials & forms on USB flash drive	$325
BEP10.KDV	DVDs and printed course materials & forms CD	$325
BEP10.KFL	Course materials & forms on USB flash drive	$65
BEP10.KHB	Printed course materials & forms CD	$65
BEP10.KDRF	DVD rental and course materials & forms (USB flash drive) (first person)	$195
BEP10.KDR	DVD rental and course materials & forms (printed book & forms CD) (first person)	$195
BEP10.AVRT	DVD rental and course materials & forms (each additional viewer) (please indicate materials format for each additional viewer when placing order)	$98

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 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. Receive basic estate planning forms as part of the course materials! Cosponsored by the Estate Planning and Administration Section.

Special Needs Trusts

June 2011—4 General CLE credits

SNT11.KCD	Audio CDs and course materials	$135
SNT11.KDV	DVDs and course materials	$195
SNT11.HB	Course materials	$65
SNT11.KDR	DVD rental and course materials (first person)	$135
SNT11.AVRT	DVD rental and course materials (each additional viewer)	$68

Special needs trusts play a vital role in elder law and estate planning practices. Hear from the local experts on what public benefits may be available, when to use a special needs trust, and how to administer a special needs trust. Gain trust drafting tips and examine how to handle personal injury cases and self-settled special needs trusts. Cosponsored by the Elder Law Section and Estate Planning and Administration Section.

The Crossroads of Estate Planning and Dissolution Law: Lessons for Lawyers in Both Fields

June 2009—6.25 General CLE credits

AEP09.KCD	Audio CDs and course materials	$195
AEP09.KDV	DVDs and course materials	$325
AEP09.HB	Course materials	$65
AEP09.KDR	DVD rental and course materials (first person)	$195
AEP09.AVRT	DVD rental and course materials (each additional viewer)	$98

Breaking up is hard to do . . . and a range of crucial legal issues face both estate planning and family law attorneys when it happens. This seminar examines a number of issues that you and your clients should consider to protect inheritance in case of future dissolution—marital or domestic, life insurance and beneficiary designations, reproductive tissue rights, using trust assets to pay child and spousal support, family business planning, strategies for parents and grandparents when making gifts, avoiding and resolving disputes over pets and personal property, and pre- and post-nuptial agreements. This is a great opportunity to learn from estate planning and family law experts on the best way to help your clients make decisions, resolve questions, and reduce the potential for future conflicts. Cosponsored by the Estate Planning and Administration Section.