The 44th Annual
PROBATE & TRUST LAW
Section Conference

DON'T MISS THESE CONFERENCE HIGHLIGHTS!
- New Federal Tax Update
- 2018 Non-Tax Case Law Update
- 2018 Legislative Update
- 49 breakout sessions, in 9 topical tracks – choose those most relevant to your practice

And you will leave with a wealth of excellent resource materials!

PLUS SPECIAL GUEST SPEAKERS:
- R. Hugh Magill
  Reimagining the Estate Planning Paradigm for the Contemporary Family
- Terrence G. Quinn
  Marketing an Estate Planning Practice
- Robert A. Stein
  The Uniform Laws Revolution in Probate and Trust Law Continues
- Sally Venverloh
  Charitable Planning with Artwork
- Suzanne Brown Walsh
  Estate Planning and Tax Issues Raised by Bitcoin and Other Cryptocurrencies
- Christopher Rodriguez
  How to Use ABLE Accounts with Special Needs Trusts
- Michael J. Burke
  Understanding Problem Gambling

MONDAY & TUESDAY
JUNE 4 & 5, 2018
SAINT PAUL RIVERCENTRE
DAY 1 – MONDAY, JUNE 4

MORNING PLENARY SESSIONS

11:30 A.M. – 12:30 P.M.
SUPER BREAKOUT A

101
Your First Client: Using the Initial Client Interview to Inform the Estate Plan
Chris Tymchuck

102
Retirement Accounts – The Basics of Post-Death Distributions
Bryan Lamison

103
Minnesota State Taxation of Trusts
Sarah F. Armstrong & Charles T. Parks, Jr.

[See Breakout 104]

104
Lessons Learned from Two Years of Living with the Minnesota UTC
William J. Brenn, Andrea S. Breycker, Joene M. Cutshall & David J. Shannon
Christopher B. Hunt (moderator)

105
Who Is My Client? Thorny Conflicts Issues in Estate Planning and Administration
Eric T. Cooperstein
1.0 ETHICS CREDIT APPLIED FOR

106
Marketing Matters – The Overview
Terence G. Quinn

12:30 – 1:30 P.M.
INSTITUTE LUNCHEON
<table>
<thead>
<tr>
<th>Time</th>
<th>Breakout B</th>
<th>Breakout C</th>
<th>Breakout D</th>
</tr>
</thead>
</table>
| 30 – 2:30 P.M. | **Your First Will and Trust: Key Considerations**  
when Drafting Your First Will and Trust  
ra Gay & Holly Okland | **Your First Probate: How to Manage Important**  
Timelines and Deadlines  
Adam J. Rohne | **Your First Health Care Directive and**  
Power of Attorney  
Melissa Hagstrum Bayne |
|              | **Estate Panel:**  
Attorney Perspectives on Planning for**  
recently-Encountered Problems  
Teri M. Hendricks, Theresa M. Kowalski & Mary Frances M. Pichard  
McKay (Moderator) | **Marital Deductions Don’t Bother Us (much)**  
Anyway: Three Cross-border Topics That Don’t**  
Involves Estate Tax  
Jennifer A. Gumbal | **The Subtleties of the Elective Share:**  
An Advanced Review of Elective Share Issues and Computations  
Robert A. McLeod |
|              | **bariary Income Tax Opportunities That Every Estate Planner Should Know**  
W. A. Hill & Maricia E. Urban | **Planning for What You Hope Doesn’t Happen:**  
Divorce Considerations for Estate Planners  
Sanya Tron Eysys & Diana M. Ringette | **Large Estates Panel:**  
Flaunting Flexibility – Keeping Your Options Open in a Temporary World  
Christopher J. Burns, Joshua C. Hillger & Mary P. Roebken  
Michael P. Sampson (Moderator) |
|              | **beneficiary Designations: Uses and Abuses**  
stijn E. Helmers & Susan A. King | **Non-Judicial Settlement Agreements:**  
How Far Can You Go?  
Pamela Lucina & John T. Welsh | [See Breakout 402] |
|              | **How to Deal with Difficult Beneficiaries**  
urteil A. Grimrud, James W. Rockwell & Dana M. Sanders  
son H. Rauenhast (Moderator) | **Trust Officer Panel:**  
Partnering with a Corporate Trustee Throughout the Life Cycle of a Trust  
Sarah N. Sanday, Carissa W. Brown, Barbara A. Mitchell &  
Ann M. Wilczynski  
Trisha A. Vincen (Moderator) | **Good Planning from the Badlands:**  
Trusting Your Client with a South Dakota Trustee  
Carl P. Peterson & Michelle L. Robson |
|              | **hat Tax Reform Means for Farmers**  
derek A. Matuszczyk | **Trusts and Techniques to Minimize Taxes for**  
Minnesota Farmers  
Ommi N. Kiecker & Patrick A. Lowther | **Handling Tax Issues in Agricultural**  
Estate Planning  
Brandon J. Edmundson & Bradley W. Hanson |
|              | **obate Panel**  
Wiam M. Asg, Andrea S. Brecken, Cynthia R. Costello,  
inid R. Donovan, Julie Peterson & Michael P. Sampson  
an J. Link (Moderator) | **Real Property Probate Transfers**  
Wayne D. Anderson & Nathan A. Bissonette | **The Looming Question for Every Probate:**  
How Much Money Is in the Estate?  
Jennifer S. Samini & Jayne E. Siskova |
|              | **e ofessional Responsibility in Estate**  
imination**  
ra M. Ringette & Julian C. Zeeb | **Elimination of Bias: Understanding Problem Gambling**  
Michael J. Burke & Joan M. BBoulhousen | **MA Update: The Possibility of Reforming MA**  
Through Waivers  
Julian J. Zwener |
|              | **aritable Planning with Artwork**  
ster Stevens & Sally Venerloeh | 2-HOUR SESSION  | 2.0 ELIMINATIONS OF BIAS CREDITS APPLIED FOR | **Winning with Workshops**  
Terence G. Quinn |

JOIN YOUR FRIENDS AND COLLEAGUES AT 5:00 P.M. FOR THE INSTITUTE RECEPTION!
### DAY 2 – TUESDAY, JUNE 5

<table>
<thead>
<tr>
<th>Time</th>
<th>Session Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:15 – 8:00 A.M.</td>
<td>Continental Breakfast</td>
</tr>
<tr>
<td>8:00 – 9:00 A.M.</td>
<td><strong>BREAKOUT E</strong></td>
</tr>
</tbody>
</table>
| 501 | Your First Estate Tax Return  
Andrew T. Howard |
| 502 | Retirement Accounts – Way Beyond the Basics  
Bryan Jamison |
| 503 | Beyond the Basics of Irrevocable Life Insurance Trusts (ILITs) in Estate Planning  
Randall B. Mauzy |
| 504 | Path to Lawyer Well-Being: Supporting the Transition of Older Lawyers  
Joan M. Bibelhausen & Brian McMahon |
| 505 | Views from the Bench: Judicial Officer Panel  
Judge Elizabeth V. Cutter, Judge Robert A. Dockerty & Referee Joel Cilless  
Alan J. Silver (moderator) |
| 506 | How to Use ABLE Accounts with Special Needs Trusts  
Christopher Rodriguez & Laurie A. Hanson |
| 507 | When Legal and Family Matters Collide, a Routine Probate Turns Ugly  
Jacqueline M. Schuh & Ivory S. Umamah |
| 508 | Drafting and Planning for Muslim Clients  
Imani S. Jadoor  
1.0 ELIMINATION OF BIAS CREDIT APPLIED FOR |
| 509 | It’s All About the Execution: Best Practices and Potential Pitfalls  
Matthew J. Ferich & Denise S. Rahne |
| 9:15 – 10:15 A.M. | **BREAKOUT F** |
| 601 | New Lawyer Panel: Advice, Q and A, Resources, etc.  
Rachel M. Dahl, Killey E.P. Henry, Megan M. Martin, Kimberly A. Pichal & Jeremy P. So  
Philip J. Rice (moderator) |
| 602 | 10 Statutes of the Probate and Trust Codes Every Scrivener Should Be Familiar With  
James T. McNary |
| 603 | Tax Considerations in Unwinding Family Limited Partnerships  
TBA |
| 604 | Strategies for Using Your Time for a Successful Practice and a Happy Life  
Kimberly M. Haskins |
| 605 | The Limits of Fiduciary Discretion (for Litigators and Planners)  
Joseph J. Sassiopp, Michael G. Kula & Denise S. Rahne  
Rodney J. Mason (moderator) |
| 606 | Hidden Traps in Directed Trust Relationships – and How to Avoid Them  
Caitlin E. Abram |
| 607 | Ancillary Probate for Snowbirds and Snow Lovers  
Cynthia R. Costello & Kevin J. Rockwell |
| 608 | The Top 20 Things All Lawyers Should Remember about Ethics  
Timothy M. Burke  
1.0 ETHICS CREDIT APPLIED FOR |
| 609 | Elder Law Panel – The Latest Developments and Special Attention to Protecting Vulnerable Adults  
William Brown, Genevieve E. Gaboriault & Suzanne M. Scheller  
Cathryn D. Reher (moderator) |

10:15 – 10:30 A.M.  
NETWORKING BREAK
0:30 A.M. – 1:15 P.M.
PLENARY SESSIONS

0:30 – 10:45 a.m.
ASBA Probate and Trust Law Section Meeting

0:45 – 11:30 a.m.
\textbf{2018 MN Legislative Update With Focus on Minnesota Estate Tax Developments} 
* a fast-paced review of estate planning related developments in the 2018 legislative session – including particular emphasis on Minnesota estate tax.
* Steven B. Barron, Jason W. Schuller & Terry L. Slay

1:30 p.m. – 12:00 p.m.
The Uniform Laws Revolution in Probate and Trust Law Continues
* Professor Stein will discuss the Uniform Directed Trust Act and the Uniform Trust Decanting Act as possible amendments to the new Minnesota Uniform Trust Law. In addition, he will describe the new Uniform Trust Act and the revised Uniform Guardianship, Conservatorship, and Other Protective Arrangements Act. Other new uniform acts currently being drafted include the Uniform Electronic Will Act and the Revised Uniform Successor Income and Principal Act.
* Robert A. Stein

2:00 – 12:15 p.m. BREAK

2:15 – 11:55 p.m.
Estate Planning and Tax Issues Raised by Bitcoin and Other Cryptocurrencies
* Like it or not, more and more clients own and invest in "crypto." After reviewing the basics of cryptocurrency and how it differs from traditional assets, this session will cover how it is treated for income tax purposes and what compliance that requires, how best to address a client’s cryptocurrency holdings in wills, trusts and financial powers of attorney, valuation issues, and charitable donations.
* Suzanne Brown Walsh

---

SPECIAL PUBLICATIONS OFFERS TO HELP YOU COMPLETE YOUR PROBATE/ESTATE LIBRARY!

AVAILABLE ONLY TO ATTENDEES AT THE 2018 PROBATE & TRUST LAW SECTION CONFERENCE

SAVE 35% WHEN YOU PURCHASE ANY 2 OF THE BOOKS LISTED BELOW.

SAVE 45% WHEN YOU PURCHASE ANY 3 OF THE BOOKS LISTED BELOW.

Choose from these fantastic manuals:

- Minnesota Trust Administration Deskbook with CLETrust
- Minnesota Estate Administration Deskbook with CLEPro
- Guardianship and Conservatorship Law Handbook
- Minnesota Probate and Trust Law Deskbook
- Elder Law Handbook

VISIT THE MINNESOTA CLE PUBLICATIONS BOOTH AT THE CONFERENCE JUNE 4-5, 2018 TO TAKE ADVANTAGE OF THESE SPECIAL OFFERS!
FACULTY & PLANNERS

• PLANNING COMMITTEE MEMBER

JOELLENE DOEHRBERT
PROBATE AND TRUST LAW
SECTION CHAIR
Attorney at Law
Alexandria

CAITLIN E. ABRAM
Faegre Baker Daniels LLP
Minneapolis

WAYNE D. ANDERSON
Ramsey County
Examiner of Titles Office
Saint Paul

SARAH F. ARMSTRONG
Faegre Baker Daniels LLP
Minneapolis

WILLIAM R. ASP
Best & Flanagan, LLP
Minneapolis

LAUREN G. BARRON
Faegre Baker Daniels LLP
Minneapolis

MELISSA HAGSTRUM BAYNE
Lakin, Hoffman
Daily & Lindgren, Ltd.
Blaine

WILLIAM J. BERENS
Dorsey & Whitney LLP
Minneapolis

JOAN M. BIBELHAUSEN
Lawyers Concerned for Lawyers
Saint Paul

NATHAN A. BISSONETTE
Ramsey County
Examiner of Titles Office
Saint Paul

ANDREA S. BRECKNER
Olson & Breckner, PA
Minneapolis

CARISSA W. BROWN
The Northern Trust Company
Minneapolis

WILLIAM BROWN
Wm. Brown Law
Roseville

MICHAEL J. BURKE
Portage, Michigan

TIMOTHY M. BURKE
Office of Lawyers
Professional Responsibility
Saint Paul

CHRISTOPHER J. BURNS
Henson & Efton, PA
Minneapolis

JOSEPH J. CASSIOCCI
Fredrikson & Byron, PA
Minneapolis

ERIC T. COOPERSTEIN
Law Office of Eric T. Cooperstein
Minneapolis

• CYNTHIA R. COSTELLO
  Mason LLP
  Minneapolis

• JOLENE M. CUTSHALL
  Faegre Baker Daniels LLP
  Minneapolis

• JUDGE ELIZABETH V. CUTTER
  Hennepin County District Court
  Minneapolis

• RACHEL M. DAHL
  Heimlich & Johnson, PLLC
  Minneapolis

• JUDGE ROBERT A. DOCHERTY
  Brown County District Court
  New Ulm

• DANIEL R. DONOVAN
  Faegre Baker Daniels LLP
  Minneapolis

• SONIA TROM EAYRS
  Barnes & Thornburg LLP
  Minneapolis

• BRANDON J. EDMUNDS
  Knutson, Shaffer & Edmonds
  Ltd.
  Farmington

• MATTHEW J. FRERICHS
  Robbins Kaplan LLP
  Minneapolis

• GENEVIEVE E. GABORIAULT
  Mid-Minnesota Legal Aid
  Minneapolis

• JENNIFER L. GILK
  Gilk Legacy Law PLLC
  Redwood Falls

• MARGARET "POOK" GRATHWOL
  Chestnut Cambreron
  Minneapolis

• KARA GRAY
  Gray Plant Mooty
  Minneapolis

• COURTNEY A. GRIMSRUD
  Aabolt Downing
  Minneapolis

• JENNIFER A. GUMBEL
  Hoverson, Johnson,
  Beckman & Hovey, LLP
  Austin

• KIMBERLY M. HANLON
  Lucile Legal, LLC
  Minneapolis

• BRADLEY W. HANSON
  Quinlan & Hughes, PA
  Saint Cloud

• LAURIE A. HANSON
  Long, Reher, Hanson & Price
  Saint Louis Park

• PETER S. HATINEK
  U.S. Bank Ascent
  Private Capital Management
  Minneapolis

• KIRSTIN E. HELMERS
  Mason & Helmers
  Saint Paul

• PETER M. HENDRICKS
  Maser, Arnundson,
  Boggs & Hendricks, PA.
  Richfield

• KILEY E. HENRY
  Dorsey & Whitney LLP
  Minneapolis

• KELLI J. HILL
  Wells Fargo Private Bank
  Minneapolis

• JOSHUA C. HILLGER
  Felhaber Larson
  Minneapolis

• ANDREW T. HOWARD
  Briggs and Morgan PA
  Minneapolis

• CHRISTOPHER B. HUNT
  Fredrikson & Byron, PA.
  Minneapolis

• IMANI S. JAAFAR
  City of Minneapolis
  Minneapolis

• BRYAN JAMISON
  Jamison & Jamison, PA.
  Shoreview

• DAVID JOYSSIN
  Best & Flanagan, LLP
  Minneapolis

• OMNI N. KIECKER
  Kiecker Law Office
  Belle Plaine

• SUSAN A. KING
  Moss & Barnett, PA.
  Minneapolis

• THERESA M. KOWALSKI
  Attorney at Law
  Monticello

• MICHAEL G. KULA
  Michael G. Kula, PA.
  Saint Paul

• SUSAN J. LINK
  Mason LLP
  Minneapolis

• PATRICK A. LOWTHET
  Pat Lowther Law
  Lake City

• PAMELA LUCINA
  BNY Mellon Wealth Management
  Chicago, Illinois

• R. HUGH MAGILL
  Northern Trust Corporation
  Chicago, Illinois

• MEGAN M. MARTIN
  Morgan Stanley
  Minneapolis

• RODNEY J. MASON
  Mason & Helmers
  Saint Paul

• RODERICK A. MAUSZYCKI
  CliftonLarsonAllen LLP
  Minneapolis

• RANDALL B. MAUZY
  President
  Fidelity Insurance Advisors
  Saint Paul

• ROBERT A. MCELROY
  Briggs and Morgan, PA.
  Minneapolis

• BRIAN MCMAHON
  Managing Director
  Major, Lindsey & Africa
  Saint Paul

• JAMES T. McNARY
  McNay Law Office
  Red Wing

• BARBARA A. MITCHELL
  U.S. Bank Private Client Reserve
  Minneapolis

• SHERYL G. MORDISON
  Gray Plant Mooty
  Minneapolis

• SCOTT M. NELSON
  Heimlich & Johnson PLLC
  Edina

• HOLLY OKLAND
  Gray Plant Mooty
  Minneapolis

• JOEL OLSON
  Probate Referee
  Ramsey County District Court
  Saint Paul

• CHARLES T. PARKS, JR.
  Faegre Baker Daniels LLP
  Minneapolis

• JULIE PETERSON
  Hennepin County Probate Court
  Minneapolis

• LORI A. PETERSON, CPA, MBA
  CliftonLarsonAllen LLP
  Minneapolis

• TAMARA L. PETERSON
  Wells Fargo Private Bank
  Minneapolis

• CARL A. PETERSON
  Saxmer Private Management, Inc.
  Minneapolis

• KIMBERLY A. PRICHAL
  Blahnik Law Office PLLC
  Prior Lake

• MARY FRANCES M. PRICE
  Long, Reher, Hanson & Price, PA.
  Minneapolis

• TERRENCE G. QUINN
  The TQL Law Firm
  Ann Arbor, Michigan

• DENISE S. RAHNE
  Robbins Kaplan LLP
  Minneapolis

• THOMAS H. RAUHENHORST
  Saxmer Private Management, Inc.

• MICHELLE L. REHEIN
  Stinson Leonard Sheet LLP
  Minneapolis

• CATHRYN D. REHER
  Long, Reher, Hanson & Price, PA.
  Minneapolis

• DIANA M. RINGUETTE
  Mason LLP
  Minneapolis

• MARY P. ROBBIN
  Gray Plant Mooty
  Minneapolis

• JAMES W. ROCKWELL
  Alsted Downing
  Minneapolis

• KEVIN J. ROCKWELL
  Mason LLP
  Minneapolis

• CHRISTOPHER RODRIGUE
  National Disability Institute
  Washington, D.C.

• ADAM J. ROHNE
  Felhaber Larson
  Minneapolis

• PHILIP J. RUCE
  Stone Arch Law Office
  Saint Louis Park

• MICHAEL P. Sampson
  Mason LLP
  Minneapolis

• DANA M. SANDERS
  Saxmer Private Management, Minneapolis

• JENNIFER S. SANTINI
  Sylkora & Santini PLLC
  Minneapolis

• SUZANNE M. SCHELLER
  Sceller Legal Solutions
  Champlin

• JACQUELINE M. SCHUH
  Engelmeier & Urschel, PA.
  Minneapolis

• JASON W. SCHULZER
  Rollin Bank Wealth Management
  Minneapolis

• CAMERON R. SEYBOLT
  Fredrikson & Byron, PA.
  Minneapolis

• DAVID J. SHANNON
  Faegre Baker Daniels LLP
  Minneapolis

• MARY E. SHEAEN
  Best & Flanagan, LLP
  Minneapolis

• ALAN J. SILVER
  Bassford Remede, PA.
  Minneapolis

• TERRY L. SLYE
  Briggs and Morgan, PA.
  Minneapolis
THANK YOU TO THE 2018 CONFERENCE CO-SPONSORS!

PLATINUM SPONSOR

US Private Wealth Management
U.S. Bank

GOLD SPONSORS

ABBOT DOWNING

NORTHERN TRUST

ALERUS

1st First Trust Company

BNY MELLON WEALTH MANAGEMENT

WELLS FARGO

THE PRIVATE BANK

SILVER SPONSOR

TRUST POINT
Investment - Trust - Since 1913

BRONZE SPONSORS

BESSEMER
TRUST

Bremer
Wealth Management

Newton Bonding
Surely The Right Way

SECURITY BANK & TRUST CO.

U.S. TRUST
Bank of America Private Wealth Management

SPONSORED EVENTS / ITEMS:

- U.S. Bank Private Wealth Management – Suzanne Brown Walsh
- Abbot Downing & The Private Bank of Wells Fargo – Reception
- Alerus Investment & Fiduciary Services – Ice Cream Break
- BNY Mellon Wealth Management – Breakfast Day 2
- First Trust Company – Luncheon Day 1
- Securian Financial – Tote Bags
- Trust Point, Inc. – Christopher Rodriguez
- Bessemer Trust – Legal QuickSheet
- Bremer Wealth Management – Lanyards
- Newton Bonding – Snack Break
- Security Bank & Trust Company – Popcorn Break
- U.S. Trust, Bank of America Private Wealth Management –
If you have a disability and need an accommodation in order to attend this seminar, please contact Minnesota CLE as soon as possible at 2650 University Avenue West #160-S, Saint Paul, MN 55114 or call us at 651-227-8269 or 800-759-8840.

SCHOLARSHIPS AVAILABLE
Minnesota CLE maintains a scholarship program for those individuals with a financial need. Most scholarships awarded are 50% off the seminar price. To obtain a scholarship application, contact Grant at 651-254-2111 or gdavies@minnCLE.org.

CANCELLATION POLICY / NO-SHOW POLICY
Paid registrants who cancel their registration at least 3 business days before the program will receive a full credit on their account; if fewer than 3 business days, a $25 administrative fee will be deducted. Paid registrants who fail to attend will receive the course materials. Passholders may purchase the course materials at 50% of the full retail price.

QUESTIONS?
Call Minnesota CLE at 651-227-8266 or 800-759-8840. Or visit us online at www.minnCLE.org.

EGISTER TODAY AT WWW.MINNCEL.ORG OR CALL 651-227-8266 OR 800-759-8840
pay by credit card, please register online or by phone.

44th Annual
ROBATE & TRUST LAW ECTION CONFERENCE
JUNE 4 & 5, 2018
SAINT PAUL RIVERCENTRE

EASE "V" APPROPRIATE BOX:
$545 MSBA member  □ $545 paralegal/legal assistant  □ $645 standard rate
I have a Minnesota CLE Season Pass.

NEW LAWYER DISCOUNT!
I was first admitted to the bar after June 4, 2015, and have deducted $60 from the tuition marked above.

Join the MSBA and pay less for Minnesota CLE seminars!
Join the MSBA go to www.mnbar.org
For more membership advantages call 1-800-882-6722

SCHOLARSHIPS AVAILABLE
Minnesota CLE maintains a scholarship program for those individuals with a financial need. Most scholarships awarded are 50% off the seminar price. To obtain a scholarship application, contact Grant at 651-254-2111 or gdavies@minnCLE.org.

MAIL TO:  Minnesota CLE
3005
2650 University Avenue West, Suite 100-S
Saint Paul, MN 55114-3005

Check here if address below is new.
Name (last) ___________________________ (first) ___________________________
Firm ________________________________
Address ______________________________
City/State/Zip _________________________
Phone ________________________________
Email ________________________________
Attorney License No. (if applicable) ________
Profession, if not attorney ________

Can't Attend? Get the Material!
The hardcopy is available for $110 (plus tax and handling). Call Minnesota CLE at 651-227-8269 or 800-759-8840 to place your order. Orders will be filled after the Institute.
The electronic version is available for $110 (plus tax). The online version may be purchased at www.minnCLE.org after June 19.