When your clients ask for advice – be prepared to give it!

LEARN:
- When, why and how to use a trust.
- The different types of trusts and when each is most useful.
- Common issues and how to avoid or resolve them.
- Tax and other fundamental considerations when creating a trust.
- And much more!

Our expert faculty prepare you to answer your clients’ important trust questions.

PLANNING
DRAFTING
ADMINISTERING

Understanding Trusts

Wednesday, March 14, 2018
Minnesota CLE Conference Center
600 Nicollet Mall, Suite 370
Third Floor City Center, Minneapolis

Thursday, March 15, 2018
Minneapolis and out-state video replays are available.

VITAL INFORMATION
PRACTICAL ADVICE
USEFUL MATERIALS

Revocable Trusts
Find out common pitfalls and how to avoid or resolve them.

Irrevocable Trusts
Find out the top considerations for Insurance Trusts and Gift Trusts.

Supplemental and Special Needs Trusts
Find out the differences between the two – and how to draft, fund, and administer each of them.

Trust Basics, Advanced Trust Concepts and practical ways to use The Uniform Trust Code PLUS Advice on cabin trusts!
SCHEDULE

8:30 – 8:45 a.m. CHECK-IN & CONTINENTAL BREAKFAST

8:50 – 9:00 a.m. Welcome & Introduction

– Michael P. Sampson

Thomas H. Rauenhorst

Course Co-Chairs

9:00 – 9:10 a.m. Not Just The Basics: An Introduction to Trusts with a Look at State Specific Matters

This practical easy to understand session starts with the basics of trust law, including definitions, use, benefits and funding. The basics are followed by a look at cabin trusts, state specific formula gifts, stand-alone QTP trusts and other Minnesota specific trust matters.

– Michael P. Sampson

Thomas H. Rauenhorst

10:30 a.m. – 12:15 p.m. (with a 15 minute break) Making the Right Choice: Revocable Trusts

Revocable trusts are the most common trust vehicle. Learn how to explain to your clients in a manner that helps them understand how to accomplish their estate planning goals using a revocable trust. Learn drafting tips for avoiding common issues that arise with revocable trusts.

– Diana M. Ringnette

Jason W. Schuller

12:15 – 1:15 p.m. Lunch (on your own)

1:15 – 2:15 p.m. Needs Trusts

– Ivory S. Umanah

Session will address drafting and funding considerations as well as how to accomplish their estate planning goals using a revocable trust. Learn drafting tips for avoiding common issues that arise with trust law, including definitions, use, benefits and funding. The basics are followed by a look at cabin trusts, state specific formula gifts, stand-alone QTP trusts and other Minnesota specific trust matters.

– Michael P. Sampson

Thomas H. Rauenhorst

2:15 – 3:00 p.m. A Good Way to Give: Irrevocable Trusts

– Michael P. Sampson

Thomas H. Rauenhorst

Irrevocable trusts are important estate planning tools, but require careful preparation. This session will cover when to recommend an insurance trust, how the insurance trust escapes estate taxation, applicable federal requirements and other considerations for gift trusts plus special pointers on cabin trusts.

– Ivory S. Umanah

1:30 – 3:45 p.m. Supplemental and Special Needs Trusts

– Ivory S. Umanah

Learn the differences and uses of these two trusts. The Supplemental and special needs trusts are established to benefit a dependent individual who will not be able to manage his or her own finances due to a physical or mental disability.

1:30 – 3:45 p.m. \( \text{Session will cover:} \)

- drafting tips for avoiding common issues that arise with revocable trusts;
- when to recommend an insurance trust, how the insurance trust escapes estate taxation, applicable federal requirements and other considerations for gift trusts plus special pointers on cabin trusts.

3:45 – 5:15 p.m. Introduction to Trusts with a Practical Way to Use Them

– Diana M. Ringnette

Jason W. Schuller

Look at State Specific Matters

– Michael P. Sampson

Thomas H. Rauenhorst

3:45 – 5:15 p.m. Making the Right Choice: Irrevocable Trusts

Irrevocable trusts are important estate planning tools, but require careful preparation. This session will cover when to recommend an insurance trust, how the insurance trust escapes estate taxation, applicable federal requirements and other considerations for gift trusts plus special pointers on cabin trusts.

– Ivory S. Umanah

3:45 – 5:15 p.m.

Video Replays

SCHOOLS AVAILABLE

Minnesota CLE maintains a scholarship program for those individuals with a financial need. Most scholarships awarded are 50% of the seminar price. To obtain a scholarship application, contact Grant at grant@mccluskey.com or 651-254-2111.

COURSE MATERIALS

Can’t attend on the day of the seminar? You can purchase the materials for $100 (plus tax and handling) by calling Minnesota CLE at 800-759-8840 or 651-227-8266.

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