

Registration Form: Elder Law & Estate Planning Institute May 29 and 30, 2025

Please fill out front and back of registration form and return both completed forms.

Name _____ ME Bar # _____
Organization _____
Address _____
City _____ State _____ Zip _____
Tel # _____ Email Address _____

Registration Information: Pre-registration is available until 4 p.m. on **May 26**. No registrations will be accepted without payment.

Cancellations for the in-person meeting at the Augusta Civic Center: You may cancel your registration for a full refund until 4:30 p.m. on **May 20**. No refund will be made after that time. The date of cancellation is the date received at Bar Headquarters in Augusta.

Walk-In Registrations: All walk-in registrants will be required to pay the applicable registration fee upon registration.

Materials: You will receive a link to the materials based on your selection, whether it's for one day or two. If you pick individual sessions, you will only receive the sessions you selected.

One-Day Registration Fee

Lunch is included on the day you select.

Please choose one day.

☐ Thurs., May 29 | ☐ Fri., May 30

MSBA Standard Member ☐ \$360
CLE Club Member ☐ \$270
Paralegals and Legal Support Staff. ☐ \$270
Non-Member ☐ \$420
Student Member ☐ \$ 45

Two-Day Registration Fee

Lunch is included on both days.

MSBA Standard Member ☐ \$460
CLE Club Member ☐ \$350
Paralegals and Legal Support Staff. ☐ \$350
Non-Member ☐ \$520
Student Member ☐ \$ 65

Individual Sessions For all Attendees

Individual Sessions ☐ \$90 ea.
Lunch: May 29 ☐ \$25
Lunch: May 30 ☐ \$25

Non-Attorney Elder & Estate Prof.

One-Day Registration ☐ \$360
☐ Thurs., May 29 | ☐ Fri., May 30
Two-Day Registration ☐ \$460

In order to receive this pricing you must fill this form out and return it. Lunch included.

Payment Information

☐ Check Enclosed # _____

Total \$ _____



Card # _____ Exp. Date _____ CSC Code _____

Name on CC _____

Billing Address _____

Telephone _____

Signature _____

CLE Club Membership: MSBA Members Only

I would like to join the CLE Club ☐ \$165

You must be a current MSBA member to join the CLE Club.

PLEASE COMPLETE AND RETURN TO:

Attention: Suzzanne Doiron
Maine State Bar Association | 124 State Street | Augusta, ME 04330
Telephone: 207-622-7554 | Fax: 207-623-0086
Email: cle@mainebar.org

(PLEASE RETURN THIS PAGE AND SESSION CHOICE PAGE)



Elder Law & Estate Planning Institute: Registration Form, Page 2.
Please indicate your session selections below. One session per time slot.

Your Name: _____

THURSDAY, MAY 29

8:30 – 10:45: PLENARY (indicate if you will be attending)

- ☐ 1. Planning for Retirement Benefits: Case Studies Show How to Navigate in the Post-SECURE World

11:00 – 12:00 (choose one topic)

- ☐ 2. Protecting a Legacy: Estate Planning for the Small Business Owner
☐ 3. Public Benefits 101*
☐ 4. Til Death—or the POA—Do Us Part: Protecting Spousal Assets from Adult Children
☐ 5. Trust as Beneficiary of IRA
☐ 6. Trust Modification

12:00 – 1:30: LUNCH

- ☐ 7. Yes, I will attend lunch.
☐ 8. No, I will not attend lunch.

1:30 – 2:30 (choose one topic)

- ☐ 9. Introduction to Estate Planning and Non-Probate*
☐ 10. Introduction to Grantor Trusts: A Review of the Tax Rules and Planning Opportunities
☐ 11. MaineCare Denial, Now What Do You Do?
☐ 12. Real Estate
☐ 13. Representing Clients Through the Maine Uniform Guardianship, Conservatorship and Protective Proceedings Act

2:45 – 3:45 (choose one topic)

- ☐ 14. Protecting a Legacy: Estate Planning for the Small Business Owner
☐ 15. Safeguarding Public Benefits with Special Needs Trusts, ABLE Accounts, and More*
☐ 16. Special Needs Trusts Administration
☐ 17. Til Death—or the POA—Do Us Part: Protecting Spousal Assets from Adult Children
☐ 18. Trust Modification

4:00 – 5:00 (choose one topic)

- ☐ 19. Advanced Concepts in Estate Planning: Case Studies*
☐ 20. MaineCare Denial, Now What Do You Do?
☐ 21. Real Estate
☐ 22. Representing Clients Through the Maine Uniform Guardianship, Conservatorship and Protective Proceedings Act
☐ 23. Special Needs Trusts Administration

5:00: RECEPTION

- ☐ 24. Yes, I will attend the reception.
☐ 25. No, I will not attend the reception.

FRIDAY, MAY 30

8:30 – 9:30 (choose one topic)

- ☐ 26. Family Camps
☐ 27. Introduction to Grantor Trusts: A Review of the Tax Rules and Planning Opportunities
☐ 28. Introduction to Tax Planning: Basic Bypass, Portability*
☐ 29. Probate 201
☐ 30. Veteran's Benefits

9:45 – 10:45 (choose one topic)

- ☐ 31. An Overview of Non-Probate Assets, Beneficiary Designations, and Trust Funding
☐ 32. Fiduciary Liability
☐ 33. MaineCare Basics*
☐ 34. Probate 201
☐ 35. Social Security Benefits: A Closer Look at Benefits for Workers and Their Spouse and Children Under Title II of the Social Security Act

11:00 – 12:00 (choose one topic)

- ☐ 36. An Overview of Non-Probate Assets, Beneficiary Designations, and Trust Funding
☐ 37. Basis Step-Up: Using 706/706ME*
☐ 38. Good Trustee Selection and Succession: A Discussion of Technical Issues and Strategies
☐ 39. Social Security Benefits: A Closer Look at Benefits for Workers and Their Spouse and Children Under Title II of the Social Security Act
☐ 40. Veteran's Benefits

12:00 – 1:15: LUNCH

- ☐ 41. Yes, I will attend lunch.
☐ 42. No, I will not attend lunch.

1:15 – 2:15 (choose one topic)

- ☐ 43. Asset Protection: Techniques Including Trusts*
☐ 44. Canada-U.S.A. Cross-Border Issues
☐ 45. Family Camps
☐ 46. Fiduciary Liability
☐ 47. Good Trustee Selection and Succession: A Discussion of Technical Issues and Strategies

2:30 – 4:00 (indicate if you will be attending)

- ☐ 48. Ethics in Client Representation-Practice Management

*** These sessions are basic-level topics.**

(PLEASE RETURN THIS PAGE AND REGISTRATION PAGE)