ELDER LAW & ESTATE PLANNING INSTITUTE

Presented by the Maine State Bar Association Elder Law and Trusts & Estate Sections

May 29-30, 2025
Augusta Civic Center

SPECIAL GUEST SPEAKER
Natalie B. Choate, JD

Maine State Bar Association

MEETING INFORMATION

In-Person at Augusta Civic Center

Registration:
Register online at **www.mainebar.org/event/elderlaw2025**, or submit your registration form via email/mail. Pre-registration is available until **4 p.m. on May 26.** No registrations will be accepted without payment.

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

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

Photography:
Registrants, instructors, exhibitors, and guests agree they may be photographed during the event. Photographic materials are the sole property of the MSBA, and the MSBA reserves the right to use attendees' names and likenesses in promotional materials without providing monetary compensation.

CLE Credits:
Thursday, May 29: Up to 6.0 CLE credits. | **Friday, May 30:** Up to 5.5 CLE credits, with the opportunity to earn ethics.
PRACPRO: All sessions have been approved for practice and procedure credit under Maine's reciprocal admission rule.

Live Webcast

Sessions that are being webcast are highlighted in **blue on pages 2-5**.

Registration:
Click here to register **directly on InReach**. You will access this CLE program through a third-party website, which requires its own username and password. Please note that your MSBA login credentials will not work on this website. **You cannot register for the webcast via email/mail.**

Cancellations/Switching from Live Program to Webcast:
Registrants who cancel registration for the live program at the Augusta Civic Center after **May 20** and choose to register for the live webcast will be charged an administrative fee of **$75**.

The MSBA cannot transfer your in-person registration to the live webcast. You will need to contact the MSBA to cancel your in-person registration, and then register online and pay the registration fee for the live webcast if you switch from the live program to the live webcast.

Registrants who registered for the live program but switch to the live webcast **on the date of the program will not receive a refund.**

CLE Credits:
Thursday, May 29: Up to 6.0 CLE credits. | **Friday, May 30:** Up to 5.5 CLE credits, with the opportunity to earn ethics.
PRACPRO: All sessions have been approved for practice and procedure credit under Maine's reciprocal admission rule.

Individual Sessions on Thursday and Friday
Individual cost: $90, per session.
Purchase 6 topics and receive a 5% discount. Purchase 7 topics and receive a 10% discount. Purchase 8 topics and receive a 15% discount. Purchase 9 topics and receive a 20% discount. Purchase 10 topics and receive a 25% discount.

AUGUSTA HOTELS: RESERVE YOUR ROOM TODAY!

FAIRFIELD INN & SUITES: The MSBA has secured a rate of $145 per room/night for non-smoking kings or non-smoking doubles (plus any applicable taxes). You must call the hotel at (207) 623-2200 and request the MSBA rate, discount not applicable online.

MAINE EVERGREEN HOTEL, ASCENT HOTEL COLLECTION: The MSBA has secured a 12% discount per room/night (plus any applicable taxes). Discount based on availability. You must call the hotel at (207) 622-3776 and request the MSBA rate, dscount not applicable online.

Courses highlighted are being offered as a live webcast.
Separate registration is required. See page 1 for details.

THURSDAY, MAY 29

Earn up to 6.0 CLE credits

7:45 – 8:30
Registration Open

8:30 – 10:45: PLENARY

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

10:45 – 11:00
Transition Break

11:00 – 12:00 (choose one topic)

2. Protecting a Legacy: Estate Planning for the Small Business Owner
3. Pubic 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

2:30 – 2:45
Transition Break

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

3:45 – 4:00
Transition Break

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

Earn up to 5.5 CLE credits, including the opportunity to earn 1.0 ethics credit.

8:00 – 8:30
Registration Open

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

9:30 – 9:45
Transition Break

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

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38. Good Trustee Selection and Succession: A Discussion of Technical Issues and Strategies
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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

2:15 – 2:30
Transition Break

2:30 – 4:00: PLENARY

48. Ethics in Client Representation-Practice Management

4:00
Program Adjourns

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

PLANNING COMMITTEE

Greta A. Atchinson, Esq., Lanman Rayne Nelson Reade
Anya F. Endsley, Esq., Verrill
Jennifer L. Frank, Esq., Lanman Rayne Nelson Reade
Michael H. Griffin, Esq., Griffin & Jordan LLC
Jennifer L. Kruszewski, Esq., Epstein & O'Donovan LLP
Mia S. Poliquin Pross, Esq., Elder Law Office of Kienitz and Pross, P.A.
Nathaniel S. Putnam Esq., Eaton Peabody
Sarah Ranger, Esq., Maine Elder Law Firm

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

Advanced Concepts in Estate Planning: Case Studies*

Thursday, May 29: 4:00 p.m.

Course description: Blended families, unequal distribution, and family business succession planning – learn how best to plan for a client who chooses to differentiate between beneficiaries. Many clients choose to give all assets to their surviving spouse and then distribute assets equally to children. However, for certain families this kind of plan may not be wise or desired. Best practice planning should accomplish client goals while minimizing the risk of family acrimony and potential litigation. This course will address identification of possible sources of contention, proactive management of potential conflict by the drafting attorney, and tools for minimizing post-mortem conflict. The course will include a discussion of options for business succession planning in addition to intrafamily transfer.

Speakers: Martha E. Greene, Esq., *Brann & Isaacson LLP*
Meghan L. Myers. Esq., Brann & Isaacson LLP

An Overview of Non-Probate Assets, Beneficiary Designations, and Trust Funding

Friday, May 30: 9:45 a.m. and 11:00 a.m.

An overview of how to avoid probate, why you should or shouldn't plan to avoid probate, and traps for the unwary. Many clients want to avoid probate even when they don't know what it is. To avoid probate, consider strategies like establishing and funding a revocable living trust, using beneficiary designations, payable-on-death designations, transfer-on-death designations for assets, transfer-on-death deeds for real estate, and lifetime gifting. However, avoiding probate can a poor return on investment for some clients. Even when probate avoidance is a primary goal, and because goals can shift with the death or disability of a client or family members or with changes in the law, care must be taken to inform clients when they should return to reconsider their plan and what other options are available.

Speakers: *Mary K. Brennan, Esq., Brennan & Rogers PLLC*
Smilie G. Rogers. Brennan & Rogers PLLC

Asset Protection: Techniques Including Trusts*

Friday, May 30: 1:15 p.m.

An Asset Protection Trust (APT) is a special type of trust that's used to protect your estate and assets from creditors. Generally, asset protection "schemes" are based on severing the connection between you and your assets. Ultimately, this means you have no control to use or distribute the assets.

Speakers: *Greta A. Atchinson, Esq., Lanman Rayne Nelson Reade*
Tracy B.C. Ferland, Esq., Lanman Rayne Nelson Reade

Basis Step-Up: Using 706/706ME*

Friday, May 30: 11:00 a.m.

The presenters will introduce you to two fictional decedents and then walk you through the preparation of the estate tax forms for each of them. Topics will include decisions surrounding basis step-up and federal/Maine QTIP elections, as well as calculation of the state death tax deduction.

Speakers: *Tudor N. Goldsmith, Esq., Jensen Baird Gardner & Henry*
Jennifer L. Kruszewski , Esq., Epstein & O'Donovan LLP

Canada-U.S.A. Cross-Border Issues

Friday, May 30: 1:15 p.m.

Many Americans have cottages or second homes or other assets in Canada. Many families have members living in both Maine and one of the Canadian Maritime Provinces nearby. What are some of the planning issues created by cross-border activities? How do real estate and probate law on each side of the line compare? What planning techniques for inter vivos gifts or estate planning are typically used? How do United States and Canadian tax laws synchronize or clash? What planning structures are viable and which ones are likely to fail? How does the Tax Treaty assist the client with cross-border issues? Everything you wanted to know about Canadian law in these areas but were afraid to ask!

Speaker: *Timothy C. Matthews, Esq., Stewart McKelvey*

Ethics in Client Representation: Practice Management (ethics)

Friday, May 30: 2:30 p.m.

In law firms, ethical conduct in client representation and practice management is crucial, encompassing duties like maintaining client confidentiality, avoiding conflicts of interest, and ensuring competence, honesty, and integrity in all interactions.

Speakers: *Laura Shorthill Curtis, Esq., Strout & Payson PA*
Katherine J. Rayne (Lanman), Esq., Lanman Rayne Nelson Reade
Barbara K. Wheaton, Esq., Pierce Atwood LLP

Family Camps
Friday, May 30: 8:30 a.m. and 1:15 p.m.
Learn estate planning methods for preserving property for future generations. The discussion will focus on irrevocable trusts and LLCs, with additional discussion of some of the problems that can arise with these different vehicles, including conflicts among family members, scheduling use, rental, maintenance and repair, restrictions on transfer, and valuation of beneficial interest.
Speakers: *Catherine Haynes Fenton. Esq., Jones, Kuriloff & Sargent, LLC*
Timothy W. Stanley, Esq., Jones Kuriloff & Sargent, LLC

Fiduciary Liability
Friday, May 30: 9:45 a.m. and 1:15 p.m.
The fiduciary duties of executors involve administering the estate according to the terms of the decedent's will. This includes marshalling and valuing the assets of the estate, paying debts and taxes, and distributing the remaining assets to the beneficiaries according to the terms of the will.
Speaker: *Marianna P. Liddell, Esq., Pierce Atwood*

Good Trustee Selection and Succession: A Discussion of Technical Issues and Strategies
Friday, May 30: 11:00 a.m. and 1:15 p.m.
Whether you are drafting a trust or administering one, good trustee selection and succession are critical. After orienting the presentation in fundamental trust concepts, this session will embark on a more advanced discussion of trustee selection and succession issues and strategies, including approaches to common problems the presenter has found successful or worthy of focus. Specific topics will include the use of independent trustees v. family member trustees, trustee appointment and removal, grantor trust income tax considerations, estate tax problems (including avoiding unintended estate tax inclusion), judicial and non-judicial trustee succession, directed trustees, trust protectors, and advanced state income planning tax strategies tied to trustee selection.
Speaker: *T. Griffin Leschefske, Esq., Pierce Atwood LLP*

Introduction to Estate Planning, Probate and Non-Probate*
Thursday, May 29: 1:30 p.m.
This session will provide a broad overview of the practice area and will be of interest both to new and experienced practitioners. The presentation will touch upon the range of clients and types of issues that are typically encountered, as well as the reasons why estate planning and probate and trust administration are so important, particularly today. It will provide some brief case examples and discuss ways to effectively discuss and work with clients around issues that can be stressful. It will also briefly touch upon various tools and resources that are available for practitioners, and address some of the many challenges and rewarding aspects of practicing in this area.
Speaker: *Parke A. Burmeister, Esq., Casco Bay Law, PLLC*

Introduction to Grantor Trusts: A Review of the Tax Rules and Planning Opportunities
Thursday, May 29: 1:30 p.m. and Friday, May 30: 8:30 a.m.
This program will provide an overview of the rules contained in I.R.C. Sections 671-679, commonly known as the grantor trust rules. It will review the circumstances under which the grantor of a revocable trust or other kind of trust is considered to be the owner for tax purposes because of certain retained interests or powers or because of certain interests or powers granted to other people. It will also cover the circumstances in which a third party other than the grantor is deemed to be the owner of a trust for tax purposes. Finally, it will describe so-called “intentionally defective grantor trusts” and their use in different planning scenarios.
Speaker: *Nathaniel S. Putnam, Esq., Eaton Peabody*

Introduction to Tax Planning: Basic Bypass, Portability*
Friday, May 30: 8:30 a.m.
This presentation will focus on the fundamentals of estate and gift taxation. The session will cover the basic planning techniques to minimize transfer taxes, including the use of estate tax exemptions and tax formulas. The topics will include credit shelter “bypass” trusts, disclaimer planning, portability, and marital and charitable estate tax exemption. The session will also introduce the concept of how lifetime gifting impacts estate taxation.
Speakers: *Matie B. Little, Esq., LeBlanc & Young PA*
Eliza Nichols, Esq., LeBlanc & Young PA

MaineCare Basics*
Friday, May 30: 9:45 a.m.
This session will educate you to help your clients obtain and stay on MaineCare.
Speaker: *Daniel J. Eccher, Esq., Levey, Wagley, Putman & Eccher, PA*
Tracy N. Sewall, Esq., Nale & Nale Law Offices

MaineCare Denial, Now What Do You Do?
Thursday, May 29: 1:30 p.m. and 4:00 p.m.
This session will cover the process, with specific practice tips, for appealing a MaineCare denial through the administrative hearing process. Topics to be covered include filing the appeal, obtaining ongoing coverage during the appeal process, and preparing for the administrative hearing. While not the primary focus, a brief overview of the 80C appeal process will also be included in this session.
Speaker: *Paul D. Shapiro, Esq., Carlin & Shapiro, PA*

Estate Planning for Retirement Benefits: Case Studies Show How to Navigate in the Post-SECURE World (2.0 credits)
Thursday, May 29: 8:30 a.m.
Speaker: *Natalie B. Choate, Esq., Ataxplan Publications*

Probate 201
Friday, May 30: 8:30 a.m. and 9:45 a.m.
This presentation will cover the entire probate process from the initial filing of a petition to open the estate, through asset inventory, debt management, distribution of assets to beneficiaries, and finally, the closing of the estate, explaining each step involved in the legal proceedings. Attendees will also receive practice tips and other recommendations regarding administration of probate estates.
Speaker: *Miles C. Hunt, Esq., Epstein & O'Donovan LLP*

Protecting a Legacy: Estate Planning for the Small Business Owner
Thursday, May 29: 11:00 a.m. and 2:45 p.m.
This session will explore the estate planning challenges that are unique to business owners and offer strategies for creating plans that meet their specific needs. It will address the intersection of estate planning and business succession planning, including a discussion of how to identify a client's goals and assemble an appropriate team of advisors to guide the client through the planning process. There will be an overview of foundational concepts in entity formation, business valuation, and estate and income taxation, with a more detailed focus on planning techniques to ensure continuity in the management of the business and a successful transition of the business.
Speaker: *Kristy M. Hapworth, Esq., Rudman Winchell*

Public Benefits 101*
Thursday, May 29: 11:00 a.m.
To practice elder law or special needs planning, attorneys must have a solid understanding of the key public benefit programs that clients rely upon to meet their needs. This session will highlight the most common benefits and will dive into the eligibility rules for each one. We will discuss Supplemental Security Income, Social Security Disability Insurance, the Childhood Disability Benefit, Medicare, Medicaid, Medicare Savings Programs, the Supplemental Nutrition Assistance Program, housing benefits, and veterans' benefits.
Speaker: *Sarah Ranger, Esq., Maine Elder Law Firm*

Real Estate
Thursday, May 29: 1:30 p.m. and 4:00 p.m.
This session will cover all of the issues of real estate in estate planning and elder law.
Speaker: *John A. Cunningham, Esq., Eaton Peabody*

Representing Clients Through the Maine Uniform Guardianship, Conservatorship and Protective Proceedings Act
Thursday, May 29: 1:30 p.m. and 4:00 p.m.
This session is intended for attorneys navigating clients through the guardianship and conservatorship process, including representing petitioners and respondents. We will discuss how best to identify whether guardianship or conservatorship is appropriate, the least restrictive alternative for the respondent, and the use of tools such as a Durable Financial Power of Attorney, Advance Health Care Directive, Supported Decision-Making, or trusts to avoid guardianship and/or conservatorship. The session will include discussion of the different considerations for young adults and older adults, and practice tips at each stage of a proceeding.
Speakers: *Elizabeth M. Bjorn, Esq., Epstein & O'Donovan LLP*
Lauren Wille, Esq., Disability Rights Maine

Safeguarding Public Benefits with Special Needs Trusts, ABLE Accounts, and More*
Thursday, May 29: 2:45 p.m.
This session is intended to be a comprehensive but introductory level discussion on protecting and maximizing public benefits for individuals with disabilities. We will dive into the tools available to planners to help protect benefits, specifically including spend-down options, first-party and third-party special needs trusts, pooled trusts, and ABLE accounts. Our goal is to enhance your ability to advise clients effectively and navigate the complexities of protecting public benefits for your clients and their families.
Speaker: *Rachel M. Trafton, Esq., Maine Elder Law Firm*

Social Security Benefits: A Closer Look at Benefits for Workers and Their Spouse and Children Under Title II of the Social Security Act
Friday, May 30: 9:45 a.m. and 11:00 a.m.
Title II of the Social Security Act provides cash benefits to workers and their families that are based on a worker's earnings and not any income or resource limits. Title II provides the foundation of the country's retirement, disability, and survivors insurance program. This session will examine how workers earn benefits, who qualifies for benefits under a worker's earnings, and how payments are calculated. It will also distinguish Title II from Title XVI and how to help clients understand the benefits they are receiving.
Speaker: *Jennifer L. Frank, Esq., Lanman Rayne Nelson Reade*

Special Needs Trust (SNT) Administration
Thursday, May 29: 2:45 p.m. and 4:00 p.m.
SNT administration involves a trustee managing the trust's assets to benefit the beneficiary while ensuring they remain eligible for government benefits like Medicaid and SSI, and the trustee must follow specific rules and regulations.
Speakers: *Rachael Billings, Norway Savings Bank*
Rebekah Bridges, Bangor Savings Bank

Til Death—or the POA—Do Us Part: Protecting Spousal Assets from Adult Children

Thursday, May 29: 11:00 a.m. and 2:45 p.m.

When one spouse faces cognitive decline, the other may find themselves financially trapped—especially when adult children take control. This seminar examines legal strategies to protect the well spouse's financial security when the incapacitated spouse's assets held separately. Through a compelling case study, a divorce attorney and an estate planner will explore:

- The power struggle between spouses and POA-holding adult children
- How divorce, legal separation, and estate planning tools can allocate assets
- The limits of POA authority and how to challenge financial abuse
- Protection from abuse of the elderly
- Advanced Health Care Directives

Speakers: *Alexander M. Chaiken, Esq., MillerAsen, PA*
Catherine C. Miller, Esq., MillerAsen, PA

Trust as Beneficiary of IRA

Thursday, May 29: 11:00 a.m.

How to work with and guide a beneficiary of an IRA in a trust.

Speaker: *Natalie B. Choate, Esq., Ataxplan Publications*

Trust Modification

Thursday, May 29: 11:00 a.m. and 2:45 p.m.

This presentation will focus on the available methods to modify a trust under Maine law, as well as some strategies that estate planners can use to make their trusts more flexible and durable over multiple generations. non-judicial settlement agreement (or "NJSA"). The presentation will address how the Maine statute authorizing non-judicial settlement agreements (NJSAs) interacts with the judicial modification provisions, the differences between modifying a charitable trust and non-charitable trust, and the limitations on proposed modifications (such as what constitutes a "material purpose"). This presentation will also discuss how to integrate a "general" amendment provision in an irrevocable trust agreement as well as how to effectively structure a trust to take advantage of the Maine Uniform Trust Decanting Act. Finally, we will touch on various issues that should be considered before modifying a trust, including potential adverse gift, estate and GST consequences of trust modification, and the situations in which each of the trust modification strategies can be used most effectively.

Speakers: *Anya F. Endsley, Esq., Verrill*
William Townshend, Esq., Verrill

Veterans Benefits

Friday, May 30: 8:30 a.m. and 11:00 a.m.

This presentation will contextualize veterans' disability law with common elements of estate planning and family law. The cross-section of these fields of practice includes survivor benefits, death benefits, and burial benefits.

Speaker: *Tyler C. Hadyniak, Esq., Mailloux & Marden PA*

Thank You to our Exhibitors

Maine Community Foundation

Maine Source Homes + Realty

Annual Partners

Allen / Freeman / McDonnell Agency

Clio

Decisis

ALPS Legal Malpractice Insurance

Cross Insurance

LawPay Credit Card Processing

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** $ ________

VISA | AMERICAN EXPRESS | DISCOVER NETWORK | MasterCard

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. Pubic 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)*
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- ☐ 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*
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- ☐ 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.
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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)*
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11:00 – 12:00 *(choose one topic)*
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12:00 – 1:15: LUNCH
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- ☐ 42. No, I will not attend lunch.

1:15 – 2:15 *(choose one topic)*
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- ☐ 44. Canada-U.S.A. Cross-Border Issues
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- ☐ 46. Fiduciary Liability
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2:30 – 4:00 *(indicate if you will be attending)*
- ☐ 48. Ethics in Client Representation-Practice Management

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

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