

Administering the Basic Estate and Trust: Not So Basic Anymore

Get the latest on:

- ◆ Key trust administration issues
- ◆ Trust repair
- ◆ Virtual assets and estate administration
- ◆ Probate mediation
- ◆ Legal ethics for estate planning attorneys

NEW! Please select your course materials in print or electronic format when registering. Effective January 1, 2012, print materials will be available *only* if you select that option.

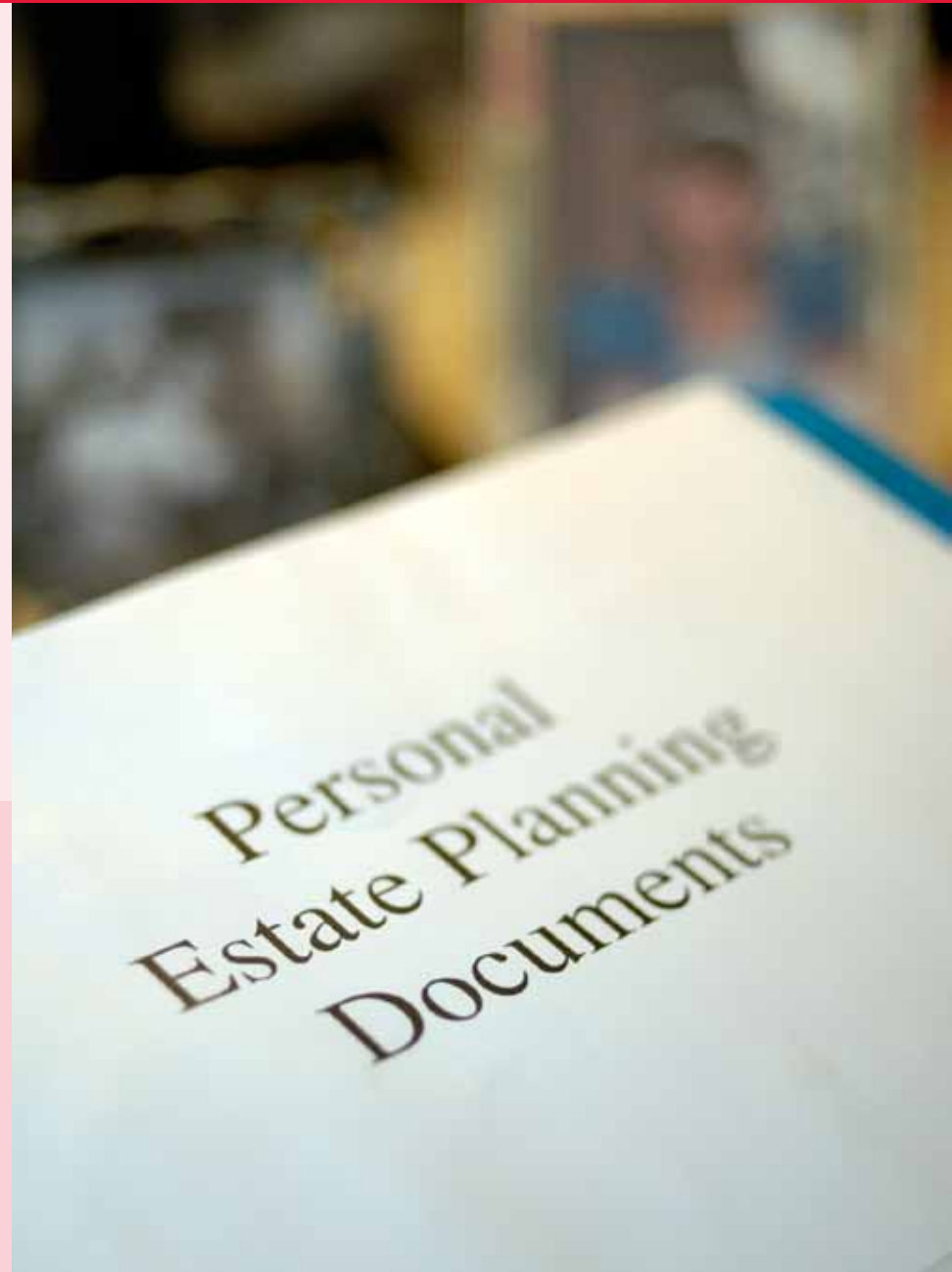
This seminar is also available as a live webcast from your computer. Can't attend the live seminar, webcast, or video replay? [Click here](#) to register for the webcast and get access to watch the video at your convenience for two months after the live seminar.

*Cosponsored by the Estate Planning
and Administration Section*

Friday, November 18, 2011
9 a.m.–4:45 p.m.

DoubleTree Hotel
Portland, Oregon

5.75 General CLE or Practical Skills credits and
1 Ethics credit



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1000 NE Multnomah
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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.

Estate Planning and Administration Section members receive a \$20 discount off registration rates. Not a member? Please call the OSB CLE Service Center at (503) 431-6413, toll-free in Oregon at 1-800-452-8260, ext. 413, to join.

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Register online at www.osbar.org/events, by using this form, or by calling the OSB CLE Service Center at (503) 431-6413, toll-free in Oregon at 1-800-452-8260, ext. 413. For a full listing of OSB CLE seminars, please visit www.osbarcle.org.

Video Replays

A video of this seminar will be shown at the following locations if a minimum of three viewers register at least seven days prior to the replay date. Please check the status of the replay at the OSB CLE Seminars website, www.osbarcle.org. Select the seminar date and title from the "CLE Events" tab. A color-coded system will indicate if the replay is taking place; all locations will be updated by the Tuesday preceding the replay date.

- ◆ **Astoria—Friday, February 17**
Di Bartolomeo Law Office
1139 Exchange St.
- ◆ **Bend—Friday, February 10**
Miller Nash LLP
1567 S.W. Chandler Ave.
Suite 204
- ◆ **Coos Bay—Friday, February 10**
Daniel M. Hinrichs PC
590 Commercial Ave.
- ◆ **Eugene—Friday, February 17**
Gaydos Churnside & Balthrop PC
440 E. Broadway, Suite 300
- ◆ **Grants Pass—Thursday, February 9**
Josephine County Courthouse
Room 222
N.W. 6th and "C" Streets
- ◆ **Hood River—Friday, February 10**
Wyers Haskell Davies & Dunn PC
216 Columbia
- ◆ **Klamath Falls—Friday, February 10**
Boivin Uerlings & Dilaconi PC
803 Main St., Suite 201
- ◆ **LaGrande—Friday, February 10**
Baum Smith & Eyre LLC
1902 Fourth St.
- ◆ **Medford—Friday, February 17**
Frohnmayr Deatherage
2592 E. Barnett Rd.
- ◆ **Newport—Friday, February 17**
Macpherson Gintner & Diaz
423 North Coast Highway
- ◆ **Pendleton—Friday, February 17**
Mautz & O'Hanlon LLP
101 S.E. Byers Ave.
- ◆ **Redmond—Friday, February 17**
Bryant Emerson & Fitch
888 S.W. Evergreen
- ◆ **Roseburg—Thursday, February 9**
Douglas County Counsel's Office
Law Library, Room 319
1036 S.E. Douglas
- ◆ **Salem—Friday, February 10**
The Vandermay Law Firm
2085 Commercial Street NE
- ◆ **Tigard—Wednesday, February 15**
Oregon State Bar Center
16037 S.W. Upper Boones Ferry Rd.
- ◆ **Vale—Friday, February 10**
Butler & Looney PC
292 Main St. S.

Webcast Replay

This seminar will be rebroadcast online on **Friday, December 9, 2011**, at 9 a.m. Pacific time. Watch the seminar from your computer and receive viewing access for up to two months after the broadcast date. Use your 2011–2012 Season Ticket to register for only \$25! **Click here** to register for the webcast replay.

Administering the Basic Estate and Trust: Not So Basic Anymore—Friday, November 18, 2011

8:00 Registration

9:00 **Revocable to Irrevocable: Key Administration Issues**

- ◆ Fiduciary duties
- ◆ Marshalling and securing assets
- ◆ Determining if probate is necessary
- ◆ Fixing broken marital and charitable deduction provisions
- ◆ Paying expenses, debts, and taxes
- ◆ Funding the next generation of trusts

Robin A. Smith, *West Coast Trust, Portland*

9:45 **Trust Repair: Modifications, Terminations, and Conversions**

- ◆ Using nonjudicial settlement agreements
- ◆ Judicial proceedings to repair, modify, or terminate trusts
- ◆ Working with the Attorney General's Office
- ◆ Appointment, powers, duties, and discharge of special representatives
- ◆ Actions by the trustee after notice

Kathleen A. Evans, *Attorney at Law, Salem*

10:45 Break

11:00 **Debtor-Creditor Issues in the Administration of Estate and Trusts**

- ◆ Processing creditors' claims in and out of probate and bankruptcy proceedings: by and against the decedent and against the trust
- ◆ Failed asset protection schemes and fraudulent transfers

Susan S. Ford, *Sussman Shank LLP, Portland*

Katherine O. VanZanten, *Schwabe Williamson & Wyatt PC, Portland*

Section Planners:

- ◆ **Jay A. Boelter**, *Brownstein Rask Sweeney Kerr Grim DeSylvia & Hay LLP, Portland*
- ◆ **Holly N. Mitchell**, *Duffy Kekel LLP, Portland*
- ◆ **Jack V. Rounsefell**, *Attorney at Law, Gresham*
- ◆ **Katharine L. West**, *Wyse Kadish LLP, Portland*
- ◆ **Eric J. Wieland**, *Samuels Yoelin Kantor LLP, Portland*

OSB CLE Seminars Attorney:

- ◆ **Karen D. Lee**, *klee@osbar.org, (503) 431-6382*
-

12:00 Lunch

(On your own, or you may order a plated lunch using the registration form.)

1:00 **Legal Ethics for Estate Planning Lawyers**

- ◆ Who is your client, before and after someone dies?
- ◆ How is that client relationship affected by giving estate planning or tax advice for use during life?
- ◆ How should you handle conflict concerns when more than one person is talking to you?
- ◆ Should the lawyer who drafted a will advise the personal representative?
- ◆ What new issues develop when litigation arises over a will or estate?

Arden J. Olson, *Harrang Long Gary Rudnick PC, Eugene*

2:00 **How to Handle Probate Mediation**

- ◆ Probate mediation rules
- ◆ Report from the field: probate mediation—so far
- ◆ Practice tips

Joshua Kadish, *Wyse Kadish LLP, Portland*

2:30 Break

2:45 **Virtual Assets and Estate Administration**

- ◆ Defining virtual assets or online information
- ◆ Integrating virtual assets into your client's estate plan
- ◆ Creating a Virtual Asset Instruction Letter (VAIL)
- ◆ Using commercial services to hold virtual assets
- ◆ Other estate administration considerations

Victoria D. Blachly, *Samuels Yoelin Kantor LLP, Portland*

Michael D. Walker, *Samuels Yoelin Kantor LLP, Portland*

3:45 **Tax Issues for Basic Trust and Estate Administration**

- ◆ Impact of the new Oregon inheritance bill
- ◆ Decedent's income tax
- ◆ Fiduciary income tax
- ◆ Retirement account tax implications

Eric J. Wieland, *Samuels Yoelin Kantor LLP, Portland*

4:45 Adjourn

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SEMINAR REGISTRATION

PORTLAND

- \$175 OSB Member—Early registration
(received before noon, Monday, 11/14/11).... \$ _____
- \$195 OSB Member—Regular registration
(received after noon, Monday, 11/14/11) \$ _____
- \$205 Non-OSB Member \$ _____

Estate Planning and Administration Section member discount—subtract \$20..... - _____

- \$20 Join the Estate Planning and Administration Section..... \$ _____
- \$0 **2011–2012 Season Ticket** (Please register by noon, Monday, 11/14/11, to guarantee a seat and course materials. After this time, Season Ticket registrations will be accommodated on a space-available basis.) ... \$ _____
- \$0 50-year and Active Pro Bono OSB members, Oregon judges and their lawyer staff—please call the OSB CLE Service Center at (503) 431-6413 or toll-free in Oregon at (800) 452-8260, ext. 413, to register.
- \$25 Lunch Vegetarian \$ _____

Course materials (please select one):

- Print version
- Electronic (a link to a PDF of the materials will be emailed no later than 48 hours prior to the seminar date)

TOTAL REGISTRATION FEES (ABE11) (782)..... \$ _____
WB

VIDEO REPLAY

(Please see video replay schedule on previous page.)

Location: _____

- \$175 Registration \$ _____
- \$155 Estate Planning and Administration Section member \$ _____
- \$0 2011–2012 Season Ticket \$ _____
- \$0 50-year and Active Pro Bono OSB members, Oregon judges and their lawyer staff—please call the OSB CLE Service Center at (503) 431-6413 or toll-free in Oregon at (800) 452-8260, ext. 413, to register.

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LIVE WEBCAST REGISTRATION

To register for the **November 18, 2011**, live webcast of this seminar, please [click here](#), or visit www.osbarcle.org and click on “Webcasts.” Use your Season Ticket to attend for just \$25!

WEBCAST REPLAY REGISTRATION

To register for the **December 9, 2011**, webcast replay of this seminar, please [click here](#), or visit www.osbarcle.org and click on “Webcasts.” Use your Season Ticket to attend for just \$25!

SEMINAR PRODUCT ORDERS

Seminar products will be available approximately two weeks after the live program.

- \$195 Audio CDs and print course materials (ABE11.KCD)..... \$ _____
- \$325 DVDs and print course materials (ABE11.KDV)..... \$ _____
- 2011–2012 Season Ticket No. _____
- discount—subtract 20% - _____
- Subtotal.....\$ _____
- \$65 Print course materials (ABE11.HB)..... \$ _____
- 2011–2012 Season Ticket No. _____
- discount—subtract 50% - _____
- Subtotal.....\$ _____
- Shipping and handling fee (U.S. only—please contact the OSB CLE Service Center for international rates) \$ 7.00

TOTAL ORDER.....\$ _____
WB

DVD RENTALS

For additional viewers, please call the CLE Service Center at (503) 431-6413 or toll-free in Oregon at (800) 452-8260, ext. 413.

- \$195 DVD rental and print course materials (ABE11.KDR) \$ _____
- Subtotal.....\$ _____
- 2011–2012 Season Ticket No. _____
- DVD rental discount—subtract 30% - _____
- Subtotal.....\$ _____
- Shipping and handling fee (U.S. only—please contact the OSB CLE Service Center for international rates) \$ 7.00

TOTAL ORDER.....\$ _____
WB

Bar # _____ Name _____

Firm Name _____

Email _____ Phone _____ Fax _____

Address _____

City _____ State _____ Zip Code _____

THREE WAYS TO REGISTER

Registrations will not be processed without payment.

1. **ONLINE** using VISA or MasterCard at www.osbar.org/events.
2. **PHONE:** (503) 431-6413, or toll-free in Oregon at (800) 452-8260, ext. 413
3. **MAIL** with check: Oregon State Bar, CLE Registration, P.O. Box 231935, Tigard, OR 97281-1935

GENERAL INFORMATION

QUESTIONS? Call the CLE Service Center at (503) 431-6413 or toll-free in Oregon at (800) 452-8260, ext. 413. For information about upcoming seminars, please visit the CLE Calendar at www.osbarcle.org.

CANCELLATIONS: Cancellation requests must be received at least 72 hours prior to the date of the seminar to qualify for a refund. Refunds are subject to a \$25 cancellation fee. To cancel, please call the OSB CLE Service Center at (503) 431-6413 or toll-free in Oregon at (800) 452-8260, ext. 413.

TUITION ASSISTANCE: Tuition assistance is available on the basis of financial need. Email a request stating your financial situation to cle@osbar.org or call the OSB CLE Service Center at (503) 431-6413 or toll-free in Oregon at (800) 452-8260, ext. 413, no later than one week before the seminar.

DIETARY RESTRICTIONS OR SPECIAL ACCOMMODATIONS: Please call (503) 431-6351 or toll-free in Oregon at (800) 452-8260, ext. 351, at least 72 hours before the date of the seminar.