

INFORMATION

DATE AND TIME: Tuesday, December 6, 2011 9:00 a.m. to 4:45 p.m.

LOCATION: Suffolk University Law School, 120 Tremont Street, Boston

TUITION: \$200; the course materials for this program will be published electronically and will be emailed to you prior to the conference. If you would like to purchase a hard copy, there will be an additional charge of \$35.00. **Order by November 14, 2011 and have the materials ready for pick-up the day of the conference.**

CREDIT: Approved for CLE Credit in RI, NH, VT and ME.

WALK-INS: Please call 617.573.8627 to confirm space availability.

REFUNDS: There is a \$15.00 cancellation fee if you cancel the business day before.

SPECIAL NEEDS: If you have special needs addressed by the Americans with Disabilities Act, please notify us as soon as possible.

BOOK ORDERS: If you're unable to attend, you may order the course materials for \$79.00. **Available in three formats: CD, electronically or hard copy**, after December 6, 2011.

Bar Admittance _____ Suffolk Alumni _____

Name(s) _____

Firm/Agency _____

Address _____

City _____ State _____ Zip _____

Phone _____ Fax _____

Email _____

(For program confirmation and eBook purposes only)

CLE Credit? (State) _____

(New Hampshire Attorneys, please include your Bar Number)

Please register me for Comprehensive Estate Planning

Check this box if you want a hard copy of the book for an additional \$35.00

Ordering Course Materials Only – \$79.00

Please send: CD Electronically Hard Copy

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Advanced Legal Studies/Suffolk University Law School

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Register on-line: www.law.suffolk.edu/als

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COMPREHENSIVE ESTATE PLANNING: TECHNIQUES AND TWEAKS UNDER THE NEW MUPC

Tuesday, December 6, 2011
Suffolk University Law School



Advanced Legal Studies
Center for CLE & Academic Conferences

ABOUT THE CONFERENCE

This program will introduce the estate planner to the Massachusetts Uniform Probate Code (MUPC), which beginning January 2, 2012 will provide new rules for wills, trusts and settlement of estates in Massachusetts. The focus will be on how these rules substantively affect the estate planning process, and the program will include an in-depth analysis of the following topics, among others –

- Changes to the rules of intestacy, and the ability to execute a “negative will”
- Changes to rules of construction
- Changes to the tax apportionment rules
- New rules relating to the effect of marriage and divorce on estate planning documents
- New trust administration rules, which will apply largely the same way to both inter vivos and testamentary trusts
- New rules for naming fiduciaries

We will work through typical estate planning instruments and discuss how the MUPC will impact the way we prepare those instruments after January 2nd. Although there will be an overview of Article III (outlining the estate settlement process), there will be much more focus on Article II (which contains substantive rules applicable to wills, trusts, beneficiary designations and other “governing instruments) and Article VII (which contains rules relating to trust administration).

BENEFITS OF ATTENDING

The material covered in this program is essential learning for anyone who prepares estate plans for Massachusetts residents. Attendees will learn, among other things –

- How the new rules apply to existing instruments
- When to revise existing documents on account of the new rules
- How to change your boilerplate language to take the new rules into account
- How to take advantage of the new estate planning tools that will be available
- How the new rules apply to beneficiary designations and other non-traditional documents that dispose of property at a person’s death
- When to use a testamentary trust and how to draft one

The program will help you understand what’s in the MUPC from a planning perspective to help you focus your study of the voluminous new law.

WHO SHOULD ATTEND

The program will be geared toward estate planning lawyers with a general understanding of basic planning techniques. It would also be appropriate for paralegals who prepare estate planning documents. The materials covered will be useful to a practitioner of any experience level who wants to understand what the MUPC means for the estate planning practice.

PANELISTS

MARC J. BLOOSTEIN, ESQ., CO-CHAIR
Ropes & Gray LLP

MARK A. LEAHY, ESQ., LL.M., CO-CHAIR
Whittum & Leahy

PROFESSOR ANTHONY B. SANDOE, CO-CHAIR
Suffolk University Law School

PATRICIA M. ANNINO, ESQ.
Prince Lobel & Tye LLP

SUSAN A. ATLAS, ESQ., LL.M.
Atlas & Atlas, P.C.
Adjunct Professor at Suffolk University Law School

CAMERON CASEY, ESQ.
Ropes & Gray LLP

MATTHEW R. HILLERY, ESQ.
Edwards Wildman Palmer LLP

ANDREW ROTHSTEIN, ESQ.
Goulston & Storrs, P.C.



AGENDA

9:00 a.m. to 12:15 p.m.

WELCOME AND OVERVIEW

Exploration of the MUPC from an Estate Planner’s Perspective
MUPC Highlights

Effect on the Tools of Estate Planning
Marc J. Bloostein and Mark A. Leahy, Co-Chairs

Wills | Patricia Annino, Moderator

Inheritance and Disinheritance
Susan A. Atlas and Anthony B. Sandoe

Formalities–Patricia M. Annino

Rules of Construction–Andrew Rothstein

12:15 Lunch (On Your Own)

1:15 p.m. to 4:45 p.m.

Effect of Marriage and Divorce–Matthew R. Hillery

Executors’ Powers, Nomination of Fiduciaries and Administration Issues–Mark A. Leahy

Tax Apportionment–Cameron Casey

Revocable Trusts | Cameron Casey, Moderator

Pour-over Rules
Post-MUPC Benefits of a Separate Revocable Trust
Matthew R. Hillery

Rules of Construction–Andrew Rothstein

Tax Apportionment–Cameron Casey

Irrevocable Trusts | Marc J. Bloostein, Moderator

Effective Date Issues; Rules of Construction and Other Matters
Patricia M. Annino

Beneficiary Designations | Matthew R. Hillery, Moderator

Rules of Construction–Andrew Rothstein

Effect of Marriage and Divorce–Matthew R. Hillery

Tax Apportionment–Cameron Casey

Powers of Attorney | Andrew Rothstein

PANEL DISCUSSION AND Q & A

4:45 Conclude