

Advanced Estate Planning 2019

Cosponsored by the Estate Planning and Administration Section

Register now at www.osbar.org/seminars (search for AEP19)



Friday, June 14, 2019

8:30 a.m.—4:45 p.m.

Multnomah Athletic Club

1849 SW Salmon Street, Portland

CLE credits: 5.75 General and 1 Ethics

Register now at www.osbar.org/seminars
(search for AEP19)

Experienced estate planning lawyers will find a wealth of information relevant to their clients. Receive an overview of the Uniform Prudent Investor Act, including trustee's rights and planning for IRA distributions to a trustee. Examine the benefits and risks of economic opportunity zones and their use in estate planning. Delve into issues related to removing occupants from estate property. Learn how to identify, create, and change grantor trusts and explore creative opportunities for charitable giving. An hour of legal ethics will cover actual complaints and some of the more interesting circumstances involved in ethics complaints.

Register by 6/10/19 and save \$20.

Estate Planning and Administration Section members save \$20 off registration rates.

LIVE EVENT



Early registration discount

Register by 6/10/19 and save \$20

- \$125 ONLD member
- \$180 Estate Planning and Administration Section member (*enter coupon code **AEP19SM** at checkout to receive discount.*)
- \$200 OSB member
- \$210 Non-OSB member
- \$25 Plated lunch
- \$15 Print course materials (*Electronic materials are included with your registration.*)

LIVE WEBCAST



Includes online access to recorded seminar for 60 days after the live event.

- \$125 ONLD member
- \$180 Estate Planning and Administration Section member (*enter coupon code **AEP19SM** at checkout to receive discount.*)
- \$200 OSB member
- \$210 Non-OSB member



Questions or need help with registration?

Call the OSB CLE Service Center:
(503) 431-6413 or (800) 452-8260, ext. 413

50-Year and Active Pro Bono OSB members and Oregon judges and their lawyer staff — please call the OSB CLE Service Center at (503) 431-6413 or (800) 452-8260, ext. 413 to register for the live seminar.

Advanced Estate Planning 2019

Cosponsored by the Estate Planning and Administration Section

Register now at www.osbar.org/seminars (search for AEP19)

- 7:30 Registration**
- 8:30 Removing Occupants from Estate Property**
- Evictions in probate
 - Rent control and renter's rights
 - Eviction vs. ejectment
 - FED vs. quiet title actions
- Hilary Newcomb, HAN Legal, Portland**
- 9:00 Speed Walking Through the Uniform Prudent Investor Act (UPIA)**
- UPIA overview
 - Trustee's rights and potential limitations under the UPIA adjustment powers and rights to unitrust conversion
 - Accounting for receipts from business entities as income or principal
 - Planning for IRA distributions to a trustee
- Christopher Cline, Riverview Trust Company, Vancouver**
Abby Landon, Tonkon Torp LLP, Portland
Mary Strasdin, CPA, McDonald Jacobs PC, Portland
- 10:00 Break**
- 10:15 Economic Opportunity or Danger Zone?**
- Benefits of economic opportunity zones
 - Use in estate planning
 - Client risks and drawbacks
 - Risks for attorneys
- Caitlin Wong, CW Law, Portland**
- 10:45 Harmless Error: What Errors are Harmless?**
- History and purpose of the harmless error rule
 - Early Oregon cases
 - Recent cases from around the country and beyond
- John Draneas, Draneas and Huglin PC, Lake Oswego**
Susan Gary, University of Oregon School of Law, Eugene
Lane Shetterly, Shetterly Irick & Ozias, Dallas
- Noon Estate Planning and Administration Section Business Meeting**
- 12:05 Lunch**
- 1:00 Your Frenemy, the Grantor Trust**
- Identifying grantor trusts
 - Creating a grantor trust
 - Avoiding grantor trust status
 - Changing grantor trust status
- Melissa May, Duffy Kekel LLP, Portland**
- 2:00 Creative Opportunities for Charitable Giving**
- Nontraditional use of charitable gift annuities
 - Planning with appreciated assets
 - Funding gifts with retirement assets
- Rebecca Bibleheimer, US Bank, Portland**
Robin Smith, Butcher & Smith Law LLC, Portland
- 3:00 Break**
- 3:15 529 Plans in the Estate**
- Gift and estate tax consequences
 - 529 plan designated successor owner
 - Consequences of failing to designate a successor owner
 - 529 plans in probate
 - Additional uses of 529 plans
- R. Brent Berselli, Holland & Knight LLP, Portland**
- 3:45 Legal Ethics with a Twist**
- Examine actual complaints
 - Explore interesting circumstances
- Scott Morrill, JD, Portland**
- 4:45 Adjourn**

Advanced Estate Planning 2019

Cosponsored by the Estate Planning and Administration Section

Register now at www.osbar.org/seminars (search for AEP19)

Section Planning Committee

Philip Jones, *Duffy Kekel LLP, Portland*

Robin Smith, *Butcher & Smith Law LLC, Portland*

Margaret Vining, *Davis Wright Tremaine LLP, Portland*

Katharine West, *Wyse Kadish LLP, Portland*

Eric Wieland, *Samuels Yoelin Kantor LLP, Portland*

Products

AEP19.CD

Audio CDs with electronic materials \$200

AEP19.DVD

DVDs with electronic materials \$230

This seminar will be available on-demand after the live program. Please visit www.osbar.org/seminars and search for AEP19. On-demand access is available for 60 days after the date of purchase.

General Information

Cancellations: Cancellation requests must be received by the OSB CLE Service Center at least 72 hours prior to the date of the seminar to qualify for a refund. Refunds are subject to a \$25 cancellation fee.

Tuition Assistance: Email a request stating your financial situation to cle@osbar.org no later than one week before the seminar.

Dietary Restrictions or Accessibility Accommodations: Please call (503) 431-6326 or (800) 452-8260, ext. 326, at least 72 hours before the date of the seminar.



CLE
Seminars

Upcoming Seminars

April 17

Lunch and Learn | Preventive Law 101: Minimizing Business and Legal Exposure (PL19)

April 19

Current Advanced Topics in Real Estate and Land Use (RE19)

May 3

39th Annual NW Securities Institute (NWSI19)

May 15

The Perfect Question with David Markowitz
How to Control the Witness, Reveal Hidden Information, and Persuade the Judge and Jury (PQ19)

Register now at www.osbar.org/seminars and search by program code.

Save the Date for Upcoming Institute:

June 6-7

19th Annual Oregon Tax Institute



Questions or need help with registration?

Call the OSB CLE Service Center:

(503) 431-6413 or (800) 452-8260, ext. 413