Targeted towards experienced estate planning lawyers, this webcast will offer a wealth of information to help serve your clients. Learn about entity considerations for trusts and estates and the key components and enforceability of pre- and post-nuptial agreements. Receive practical tips for drafting, funding, and administering joint trusts. Examine the tax consequences of trust and estate litigation settlement agreements. Fulfill your mental health/substance use requirement by delving into the signs and symptoms of unhealthy stress.

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Robin Smith, Butcher & Smith Law LLC, Portland
Margaret Vining, Davis Wright Tremaine LLP, Portland
Katharine Malone, Wyse Kadish LLP, Portland
Eric Wieland, Samuels Yoelin Cantor LLP, Portland

Friday, November 13, 2020
8:30 a.m.–4:35 p.m.
Pacific Daylight Time (PDT)

LIVE WEBCAST

CLE credits: 5.75 General,
1 Mental Health/Substance Use

LIVE WEBCAST REGISTRATION

$110 ONLD member
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Electronic materials are included with registration. On-demand access is available for 60 days after the date of purchase.

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8:30 Entity Considerations for Trusts and Estates
• Choice of entity considerations
• S Corporations
• Advanced planning for entities in estate administration

Nicole Erickson, Law Office of Jonathan D. Mishkin PC, Portland
Jonathan Mishkin, Law Office of Jonathan D. Mishkin PC, Portland

9:15 Transition

9:20 Estate Planning with Relationship Agreements
• The Oregon family law relationship with two key components of prenuptial agreements
• Enforceability of prenuptial agreements
• Prenuptial agreement term and amendments
• Post-nuptial agreements

Susan Bock, Stoel Rives LLP, Portland
Shawn Menashe, Gevirtz Menashe PC, Portland

10:20 Break

10:30 The Joint Trust in Oregon: A Square Peg in a Round Hole?
• Federal tax law applicable to joint trusts in separate property states
• Joint trusts as useful estate planning tools for married couples in Oregon and when they should be avoided
• Practical tips for drafting, funding, and administering joint trusts

Jessica Baggenstos, Duffy Kekel LLP, Portland
Melissa May, Duffy Kekel LLP, Portland

11:30 Transition

11:35 Stewardship Trusts are Innovative and Electronic Wills are Inevitable
• Stewardship trusts—a new option for structuring a business
• Using a stewardship trust for a mission-driven or family-owned business
• Preview of the Oregon bill authorizing electronically executed wills
• E-will legislation in other states

Professor Susan Gary, University of Oregon School of Law, Eugene

12:15 Lunch

1:00 Resolving Tax Compliance and Collection Matters for the Estate
• Understanding the fiduciary duties related to tax matters
• Addressing the decedent’s and estate’s unfiled tax returns
• Navigating tax collection matters
• Negotiating penalty abatements
• Resolving tax liens against property

Jessica McConnell, Samuels Yoelin Kantor LLP, Portland

2:00 Transition

2:05 Tax Aspects of International Estate Planning
• Non-U.S. citizens or domicile
• U.S. expatriates
• Expatriation tax under IRC Section 877A
• Foreign trusts involving U.S. citizens/residents
• U.S. domestic trusts/estates involving non-U.S. beneficiaries

Masataka Yamaguchi, Perkins & Co., Portland

2:50 Break

3:00 Tax Consequences of Trust and Estate Litigation and Settlement Agreements
• Income, estate, and gift tax consequences of settlements and judgments
• The danger of “friendly litigation”
• The importance of a bona fide cause of action
• Deductibility of payments made pursuant to a settlement

Philip Jones, Duffy Kekel LLP, Portland

3:30 Transition

3:35 Bringing Your Best Self to Work: Stress, Trauma, and Resilience
• Signs and symptoms of substance misuse, anxiety, depression, and unhealthy stress
• Factors that prevent lawyers from seeking help for mental health conditions
• Resilience techniques that can help lawyers reduce work-related stress

Bryan Welch, Oregon Attorney Assistance Program, Portland

4:35 Adjourn