

Advanced Estate Planning 2024

Cosponsored by the Estate Planning and Administration Section

Register now at www.osbar.org/seminars (search for AEP24)



Geared for more experienced estate planning attorneys, this seminar covers a host of topics to stay proficient. The morning starts with an update of Oregon legislation from the 2023 session and finishes by reviewing the state's new natural resource property exemption. Get a head start on planning for the federal estate tax exemption sunset in 2026, and learn about legal ethics in an estate planning practice. Lynda Sands, a lawyer and recognized expert in strategic designs and solutions for philanthropic transfers of wealth, shares her expertise with charitable remainder trusts.

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

Friday, June 14, 2024

8:25 a.m.–3:45 p.m. PDT

Oregon State Bar Center

16037 SW Upper Boones Ferry Rd., Tigard
or Via Live Webcast

CLE credits: 5 General and 1 Ethics (Oregon specific)

MCLE ID #: 111813

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In-Person Event

\$125	ONLD member
\$180	Estate Planning and Administration Section member
\$200	OSB member
\$210	Non-OSB member
\$20	Box lunch

Electronic materials are included with your registration.



Live Webcast

\$125	ONLD member
\$180	Estate Planning and Administration Section member
\$200	OSB member
\$210	Non-OSB member

Webcast registration includes online access to the recorded seminar for 60 days after the event and electronic materials.



Closed captions available

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 seminars.



Questions or need help with registration?

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

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Schedule

- 7:45 Registration and Continental Breakfast**
- 8:25 Welcome**
- 8:30 Oregon Update—What’s New, Important, or Just Interesting**
- 2023 Session legislation
 - Cases of note, including:
 - A federal probate exception
 - Inherited property and dissolution of a marriage
 - Parentage, malpractice, guardianship, and undue influence
- Susan Gary, University of Oregon School of Law, Eugene**
- 9:30 Transition break**
- 9:35 Charitable Remainder Trusts: Mystery or Mastery?**
- Ways to design a CRT to be flexible and meet clients’ needs
 - How to easily draft a CRT using a multi-function template
 - Save time with client intake by using a fill-in CRT questionnaire
- Lynda Sands, Attorney at Law, Redmond**
- 11:05 Networking Break**
- 11:20 Wills and Won’ts: Navigating the Ethical Tightropes of Estate Planning**
- Having competent clients
 - Confidentiality: how and when to authorize release of the files
 - Conflicts of interest: joint representations
 - Can you represent too many family members?
- David Elkanich, Buchalter, Portland**
- 12:20 Lunch**
- 1:00 Use It or Lose It—Planning for the 2026 Exemption Sunset**
- Pre- and post-sunset math
 - Clawback potential
 - Gifting strategies
 - SLATs
 - Grantor trusts
- John Draneas, Draneas Huglin Dooley LLC, Lake Oswego**
- 2:30 Networking Break**
- 2:45 Farms, Forests, and Fish—the Triple F in Estate Planning**
- *Make hay while the sun shines*: the new natural resources property exemption
 - *Fish or cut bait*: comparing the natural resource exemption with the natural resource credit
 - *The forest has me believing in magic*: planning for these unique assets to save Oregon estate tax
- Heather Gilmore, Heather O. Gilmore PC, Keizer**
Barbara Smith, Heltzel Williams PC, Salem
- 3:45 Adjourn**

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Planning Committee

Heather Gilmore, *Heather O. Gilmore PC, Keizer*

Katharine Malone, *Attorney at Law, Portland*

Melissa May, *Duffy Kekel LLP, Portland*

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

Ashley Sundar, *Sundar Law LLC, Portland*

Eric Wieland, *Samuels Yoelin Kantor LLP, Portland*

General Information

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 (800) 452-8260, ext. 413.

Tuition Assistance: Email a request stating your financial situation to cle@osbar.org or call the OSB CLE Service Center at (503) 431-6413 or (800) 452-8260, ext. 413, no later than one week before the seminar.

Dietary Restrictions or Accessibility

Accommodations: Please call (503) 431-6375 or (800) 452-8260, ext. 375, at least 72 hours before the date of the seminar.

Hotel Accommodations: Special rates starting at \$139 plus tax are available at The Grand Hotel at Bridgeport, 7265 SW Hazel Fern Rd., Tigard, OR 97224. Call 503-968-5757 / toll free 1-866-968-5757 and reference the Oregon State Bar rate or [click here](#) reserve online.

Products

AEP24.CD

Audio CDs with electronic materials..... \$200

This seminar will be available on-demand after the live program. Please visit www.osbar.org/seminars and search for AEP24. On-demand access is available for 60 days after the date of purchase.



CLE
Seminars

Upcoming Seminars

June 6–7

24th Annual Oregon Tax Institute
OTI24

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

Save the Date

June 27–28

Labor and Employment Bootcamp