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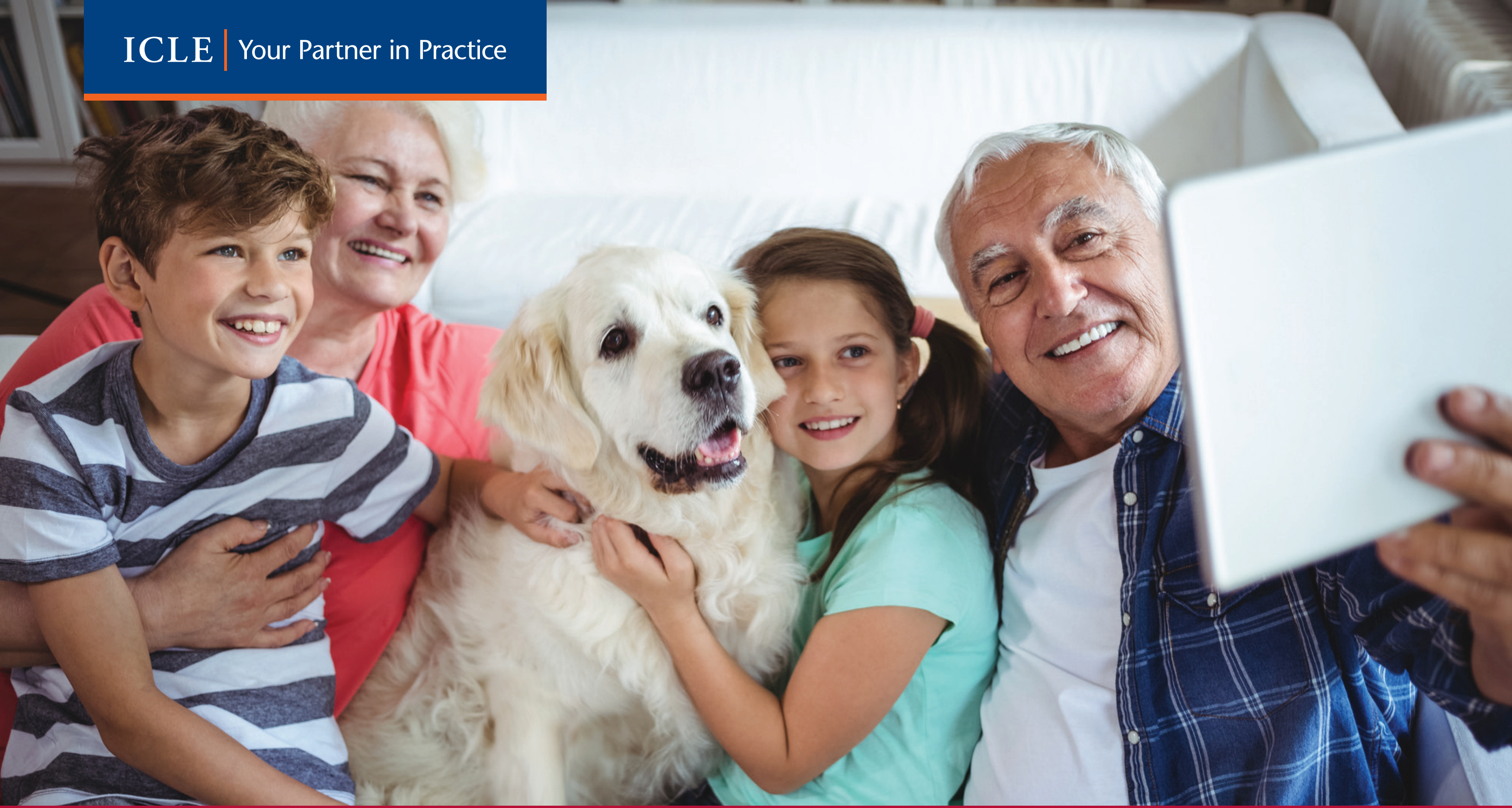

59TH ANNUAL

MAY 16–18, 2019 | ACME
JUNE 20–21, 2019 | PLYMOUTH

Probate & Estate Planning *institute*

Secure Your Clients for Generations

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Clever Tips on Trust Drafting

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ICLE
THE INSTITUTE OF CONTINUING LEGAL EDUCATION
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NEW!
This event helps you save on malpractice insurance. *See page 3.*

Secure Your Clients for Generations

Get practical solutions, no matter your experience level. Hear from local and national experts who understand your challenges because they've been there. Dissect a trust and improve your drafting. Unravel digital assets, family business interests, clients with chronic disease, and more. Whether you join us in Acme or Plymouth, the schedules are packed with effective strategies you can immediately apply to your practice.

THE BEST SPEAKERS—FROM MICHIGAN AND BEYOND

Andrea C. Chomakos

Parker Poe Adams & Bernstein LLP, *Charlotte, NC*

Andrea is a rising star on the national circuit. She breaks down business interests, both big and small. Get a grip on unique issues from someone who handles these situations every day.

Dennis M. Kennedy

Dennis Kennedy Advisory Services LLC, *Ann Arbor*

Dennis is a pioneer in digital assets. See why he is widely praised for his ability to explain complicated, evolving technology issues that affect your estate planning practice.

Michele C. Marquardt

DeMent and Marquardt PLC, *Kalamazoo*

Michele is a big draw wherever she speaks. Her "Dozen Drafting Tips" presentation will keep you on the edge of your seat as she demonstrates clever ways to resolve tricky issues.

Douglas A. Mielock

Foster Swift Collins & Smith PC, *Lansing*

Doug has been an ICLE contributor for more than 20 years. He takes a "kitchen sink" trust and breaks it down, clause by clause. (And sends you home with a fully annotated document.)

Martin M. Shenkman

Shenkman Law, *Fort Lee, NJ*

Martin is an award-winning author and expert who brings a personal touch to his work. He gives firsthand advice on chronic disease, charitable giving, and tax planning.

> "Smart lawyers stay smarter by attending this institute.
>
> Howard H. Collens, Galloway and Collens PLLC, *Huntington Woods*

WALK AWAY PREPARED FOR ANYTHING

Even the most experienced practitioners tell us they benefit from our Core Concepts programming. You can also dig deeper into topics with our Advanced Planning Track. Gain insight on impending issues that are sure to affect the future of estate planning. There truly is something for everyone.

Cutting-Edge Concerns

You may have to deal with cryptocurrency sooner than you think. Think beyond Bitcoin. We also have a session on unique real property issues, from cell towers to solar panels.

Unconventional "Wills"

How do you handle scribbles on a paper plate or cocktail napkin? What about video or digital wills? Get expert guidance on writings intended as wills.

Medicaid, Elder Law, and Disability Update

Eliminate the fear factor often associated with government benefits. Get the latest state and federal developments and employ new planning techniques.

The Digital Footprint

Go beyond your client's basic social media involvement. Effectively manage the decedent's electronic assets and prevent fraud. Understand the critical importance of a "password keeper."

Millennial Perspectives

Understand the next generation of clients—and attract and maintain those clients—with better insight into their unique needs. Grasp common issues and goals.

> "The program is loaded with nuts-and-bolts information useful to my practice.
>
> R. John Poch, Kane Funk Poch & Van Massenhove PC, *Alpena*

TAILOR THE TRIP THAT WORKS FOR YOU

Attend in May or June. The experience is yours to customize. Build an extended getaway around our Acme event or spend less time out of the office with a quick trip to Plymouth. We make it easy to choose what's best for you—from how far you're willing to travel to which topics mean the most to your practice.

Save More with ICLE

We've teamed with CNA and Paragon Underwriters to help you save on malpractice insurance. Now, the more you do with ICLE, the more you save!

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Acme Agenda

CLE: Up to 12.5* | **CTFA Credit:** Up to 13.25** | **Level:** Basic/Intermediate/Advanced

PCP PROBATE & ESTATE PLANNING CERTIFICATE PROGRAM ELECTIVE

THURSDAY, MAY 16, 2019

12:00pm Registration and Vendor Showcase
1:00pm Welcoming Remarks and Announcements
1:30pm Caselaw Update
2:10pm Aging Issues: Estate and Financial Planning for Clients Living with Chronic Disease, Disability, and Age Issues
3:00pm Networking Break

	Advanced Planning Track	Core Concepts Track
3:15pm	Estate Planning and Charitable Giving after TCJA	Estate Planning for Millennials
3:45pm	Estate and Tax Planning Nuggets	How to Protect Estates from Hackers and Identity Thieves
4:15pm	Powers to Direct Trustees	Basic Tax for Estate Planners: Understanding the Tax Part of “Death and Taxes”
4:45pm	Questions and Answers	Questions and Answers

6:00pm Networking Reception

FRIDAY, MAY 17, 2019

7:30am Registration, Continental Breakfast, and Vendor Showcase
8:15am Remarks from the State Bar Executive Director
8:30am Marquardt's Dozen Drafting Tips
9:30am It’s Not Your Business! Dealing with Business Interests in Estates and Trusts
10:20am Networking Break

	Disability Planning Track	Intersections Track
10:35am	Medicaid, Elder Law, and Disability Update 2019	Digging into the Issues of Holding Real Estate in Trust
11:10am	Determining Capacity Upon Initial Representation	Why Buy-Sell Agreements Are Just as Important as Trust Agreements When a Trust Owns a Business Interest
11:45am	PACE and MI Choice Waiver Programs	Estate Planning and Divorce: Case Studies
12:20pm	Questions and Answers	Questions and Answers

12:30pm Networking Lunch on Premises with Hot Topic Discussions (Pre-Registration Required—Limit 90)

	Special Basic Session	Special Advanced Session
1:30pm	New Lawyers, You Have the Floor	The Ins and Outs of Powers

[1]MP3 download available to all registrants after the seminar. *No CLE credit is given to the Acme session “SPECIAL BASIC SESSION: New Lawyers, You Have the Floor.” **ABA Professional Certifications is dedicated to promoting the highest standards of performance and ethics within the financial services industry. *59th Annual Probate & Estate Planning Institute* has been approved for the following CTFA credits—Acme: Up to 13.25. This statement is not an endorsement of this program or its sponsor. Certification holders must report these credits at aba.csod.com. This approval should only be used for the program, *59th Annual Probate & Estate Planning Institute* and is valid for one year from the date of approval. Any other use of the American Bankers Association (ABA) name and logo is strictly prohibited.

Acme Agenda

SATURDAY, MAY 18, 2019

7:30am	Registration, Continental Breakfast, and Vendor Showcase
8:30am	Legislative Update
8:50am	Byte-Size Planning: The Increasing Importance of Digital Assets
9:30am	Anatomy of a Trust
10:20am	Networking Break

	Financial Track	Estate Administration Track
10:35am	Hot Topics in Retirement Assets[1]	Marketing and Running the Successful Estate Administration Practice: Responding to Today's Challenges[1]
11:10am	Cryptocurrency Planning: Bitcoin and Beyond[1]	View from the Probate Register's Counter[1]
11:45am	The Ins and Outs of the Prudent Investor Rule[1]	Writings Intended as Wills[1]
12:20pm	Questions and Answers	Questions and Answers

Acme Special Sessions

Acme/1:30pm/Friday

New Lawyers, You Have the Floor *(Basic)*

ask your practice management and substantive questions in this open forum

Kevin P. Cummings, Kevin P. Cummings PLC, *Brighton*; Pete Hairston, Sarah's Law Firm PLC, *Alma*; Rebecca K. Wrock, Couzens Lansky Fealk Ellis Roeder & Lazar PC, *Farmington Hills*

Acme/1:30pm/Friday

The Ins and Outs of Powers *(Advanced)*

administrative and dispositive powers (equity and law) • fiduciary powers (and entity trust powers in Michigan) • validity and conflict of laws (three "relations back") • tax aspects of exercise (trap-blessings and constructive additions)

James P. Spica, Dickinson Wright PLLC, *Detroit*

THINGS TO DO IN ACME

What's not to love about the Traverse City area? Take advantage of all the resort has to offer—from golf to spa specials—or blaze your own trail. There are amazing casinos, breweries, and wineries to explore. Charter a boat, take a hike, or check out the shops and eateries at the historic Village. Venture to Sleeping Bear Dunes National Lakeshore—named the "Most Beautiful Place in America."

Golf

Special rates at championship courses:

The Bear $70 M–F | $85 S–Su | $50 Twilight

The Wolverine $60 M–F | $70 S–Su | $45 Twilight

Spruce Run $45 M–F | $50 S–Su | $35 Twilight

Tee times: 800-748-0303 or www.grandtraverseresort.com

Mention ICLE for discounted rates. Twilight begins at 2:30pm. Based on availability. Rental clubs available. For groups of eight or more, call 231-534-6168.

Spa

Receive $10 off any $110 spa treatment.

Inspired by the rejuvenating nature of Northern Michigan, Spa Grand Traverse offers a wide array of massage therapies, skin care, and signature treatments.

Reservations: 800-748-0303 ext. 6750 or spadesk@gtresort.com

Spa menu: www.grandtraverseresort.com

Mention ICLE for discounted rate. Not valid with other offers. Certain restrictions may apply. Reservations required. Gratuity not included.

Plymouth Agenda

CLE: 10.5 | **CTFA Credit:** 10.75* | **Level:** Basic/Intermediate/Advanced

PCP PROBATE & ESTATE PLANNING CERTIFICATE PROGRAM ELECTIVE

7:30am Registration, Continental Breakfast, and Vendor Showcase (Both Days)

THURSDAY, JUNE 20, 2019

8:30am Welcoming Remarks and Announcements

8:50am Caselaw Update

9:30am Aging Issues: Estate and Financial Planning for Clients Living with Chronic Disease, Disability, and Age Issues[2]

10:20am Networking Break

	Advanced Planning Track	Core Concepts Track
10:35am	Estate Planning and Charitable Giving after TCJA[2]	Estate Planning for Millennials
11:10am	Estate and Tax Planning Nuggets[2]	How to Protect Estates from Hackers and Identity Thieves
11:45am	Powers to Direct Trustees	Basic Tax for Estate Planners: Understanding the Tax Part of “Death and Taxes”
12:15pm	Questions and Answers	Questions and Answers

12:30pm Networking Lunch on Premises with Hot Topic Discussions

1:45pm Marquardt's Dozen Drafting Tips

2:45pm It’s Not Your Business! Dealing with Business Interests in Estates and Trusts[2]

3:35pm Networking Break

	Disability Planning Track	Intersections Track
3:45pm	Medicaid, Elder Law, and Disability Update 2019	Digging into the Issues of Holding Real Estate in Trust
4:25pm	Determining Capacity Upon Initial Representation	Why Buy-Sell Agreements Are Just as Important as Trust Agreements When a Trust Owns a Business Interest[2]
5:05pm	PACE and MI Choice Waiver Programs	Estate Planning and Divorce: Case Studies
5:40pm	Questions and Answers	Questions and Answers

5:50pm Networking Reception

FRIDAY, JUNE 21, 2019

8:30am Legislative Update

8:50am Byte-Size Planning: The Increasing Importance of Digital Assets

9:30am Anatomy of a Trust

10:20am Networking Break

	Real Property Track	Estate Administration Track
10:35am	Administration of Real Estate Assets[1]	Marketing and Running the Successful Estate Administration Practice: Responding to Today’s Challenges[1]
11:15am	Positioning the Family Cottage for Generations[1]	View from the Probate Register’s Counter[1]
11:55am	Special Real Property Issues[1]	Writings Intended as Wills[1]
12:30pm	Questions and Answers	Questions and Answers

[1]MP3 download available to all registrants after the seminar. [2]Video presentation. *ABA Professional Certifications is dedicated to promoting the highest standards of performance and ethics within the financial services industry. *59th Annual Probate & Estate Planning Institute* has been approved for the following CTFA credits—Plymouth: 10.75. This statement is not an endorsement of this program or its sponsor. Certification holders must report these credits at aba.csod.com. This approval should only be used for the program, *59th Annual Probate & Estate Planning Institute* and is valid for one year from the date of approval. Any other use of the American Bankers Association (ABA) name and logo is strictly prohibited.

Plenary Sessions: Acme and Plymouth

Acme/1:00pm/Thursday
Plymouth/8:30am/Thursday

Welcoming Remarks and Announcements

Jennifer M. Grieco, President, State Bar of Michigan, Neuman Anderson Grieco McKenney PC, *Birmingham (Acme only)*; Marguerite Munson Lentz, Chair, Probate & Estate Planning Section of the State Bar of Michigan, Bodman PLC, *Detroit*

Acme/1:30pm/Thursday
Plymouth/8:50am/Thursday

Caselaw Update

David L. J. M. Skidmore, Warner Norcross + Judd, *Grand Rapids*

Acme/2:10pm/Thursday
Plymouth/9:30am/Thursday/Video Presentation

Aging Issues: Estate and Financial Planning for Clients Living with Chronic Disease, Disability, and Age Issues

enhancing a traditional estate plan with special provisions to address issues pertaining to chronic illness and disability • drafting tips—what documents to use and how to modify them • investment and financial planning • insurance considerations • how to help clients protect themselves

Martin M. Shenkman, Shenkman Law, *Fort Lee, NJ*

Acme/6:00pm/Thursday
Plymouth/5:50pm/Thursday

Networking Reception

relax and join faculty, sponsors, exhibitors, and fellow registrants for light hors d'oeuvres and cocktails

Acme/8:15am/Friday

Remarks from the State Bar Executive Director

Janet K. Welch, Executive Director, State Bar of Michigan, *Lansing*

Acme/8:30am/Friday
Plymouth/1:45pm/Thursday

Marquardt's Dozen Drafting Tips

inquiry, objectivity, honesty, sagacity • scrutiny, simplicity, clarity, sufficiency • portability, creativity, efficiency, flexibility

Michele C. Marquardt, DeMent and Marquardt PLC, *Kalamazoo*

Acme/9:30am/Friday
Plymouth/2:45pm/Thursday/Video Presentation

It's Not Your Business! Dealing with Business Interests in Estates and Trusts

fiduciary considerations when a closely held business interest is held in trust • advising clients when the estate/trust will include a business interest, with focus on the non-tax aspects/considerations • avoiding beneficiary conflicts with the family business when not all family members are involved in the business

Andrea C. Chomakos, Parker Poe Adams & Bernstein LLP, *Charlotte, NC*

Acme/12:30pm/Friday
Plymouth/12:30pm/Thursday

Networking Lunch on Premises with Hot Topic Discussions

connect with colleagues and discuss the institute's most thought-provoking topics

(Pre-Registration Required in Acme—Limit 90)

Acme/8:30am/Saturday
Plymouth/8:30am/Friday

Legislative Update

Howard H. Collens, Galloway and Collens PLLC, *Huntington Woods (Plymouth only)*; Nathan R. Piwowarski, McCurdy Wotila & Porteous PC, *Cadillac (Acme only)*

Acme/8:50am/Saturday
Plymouth/8:50am/Friday

Byte-Size Planning: The Increasing Importance of Digital Assets

the growing universe of digital assets and digital property • controlling and maintaining online access—passwords, biometrics, and beyond • finding and transferring assets, including cryptocurrencies • drafting and planning suggestions • using digital estate planning to build your practice

Dennis M. Kennedy, Dennis Kennedy Advisory Services LLC, *Ann Arbor*

Acme/9:30am/Saturday
Plymouth/9:30am/Friday

Anatomy of a Trust

clause-by-clause review of a revocable trust instrument • role and legal authority for each clause • options for common clauses • ideas for adding or modifying clauses in your form documents

Douglas A. Mielock, Foster Swift Collins & Smith PC, *Lansing*

Tracks

Advanced Planning Track

Acme/3:15pm/Thursday
Plymouth/10:35am/Thursday/Video Presentation

Estate Planning and Charitable Giving after TCJA

how the new tax landscape affects charitable giving • how the proposed SALT charitable regulations work • updating estate plans for the law • giving strategies

Martin M. Shenkman, Shenkman Law, *Fort Lee, NJ*

Acme/3:45pm/Thursday
Plymouth/11:10am/Thursday/Video Presentation

Estate and Tax Planning Nuggets

practical impact of the latest tax developments • drafting and planning suggestions

Martin M. Shenkman, Shenkman Law, *Fort Lee, NJ*

Acme/4:15pm/Thursday
Plymouth/11:45am/Thursday

Powers to Direct Trustees

overview of the Michigan Directed Trust Act • comparison of powers using "trust protectors" and the Directed Trust Act • trust distribution committees • impact on your clients

Judith M. Grace, Greenleaf Trust, *Birmingham (Acme only)*; James P. Spica, Dickinson Wright PLLC, *Detroit*

Acme/4:45pm/Thursday
Plymouth/12:15pm/Thursday

Questions and Answers

Core Concepts Track

Acme/3:15pm/Thursday
Plymouth/10:35am/Thursday

Estate Planning for Millennials

understanding millennials and how they view estate planning • common scenarios, needs, and goals • planning for student loans • attracting and retaining millennial clients

Rebecca K. Wrock, Couzens Lansky Fealk Ellis Roeder & Lazar PC, *Farmington Hills*

Acme/3:45pm/Thursday
Plymouth/11:10am/Thursday

How to Protect Estates from Hackers and Identity Thieves

maintaining confidentiality and data security in your law office • death certificates, financial institutions, and credit reporting agencies • assessing exposure from a decedent's digital footprint • preventing fraudulent trust and estate return filings

John D. Mabley, Chalgian & Tripp Law Offices, *Southfield*

Acme/4:15pm/Thursday
Plymouth/11:45am/Thursday

Basic Tax for Estate Planners: Understanding the Tax Part of "Death and Taxes"

overview of taxes that matter to estate planners • essentials of tax returns • tips for your practice

Joan C. Skrzyniarz, Dickinson Wright PLLC, *Troy*

Acme/4:45pm/Thursday
Plymouth/12:15pm/Thursday

Questions and Answers

Disability Planning Track

Acme/10:35am/Friday
Plymouth/3:45pm/Thursday

Medicaid, Elder Law, and Disability Update 2019

Michigan and federal developments • updated and effective planning techniques • special needs strategies • veterans' benefits update

Kathleen Hogan Aguilar, Miller Johnson, *Grand Rapids*

Acme/11:10am/Friday
Plymouth/4:25pm/Thursday

Determining Capacity Upon Initial Representation

applicable law • assessing capacity • documenting capacity • preparing for incapacity • challenges to capacity

Charles S. Ofstein, DeMent and Marquardt PLC, *Kalamazoo*

Acme/11:45am/Friday
Plymouth/5:05pm/Thursday

PACE and MI Choice Waiver Programs

introduction to PACE and MI Choice Waiver • snapshot date • timing the application • other unique issues

Erin L. Majka, Chalgian & Tripp Law Offices, *Battle Creek*

Acme/12:20pm/Friday
Plymouth/5:40pm/Thursday

Questions and Answers

Intersections Track

Acme/10:35am/Friday
Plymouth/3:45pm/Thursday

Digging into the Issues of Holding Real Estate in Trust

transfers into trust—title, uncapping and transfer tax, environmental issues • ownership in trust—creditor issues, insurance issues, family issues • sale/distribution from trust—certificate of trust and authority issues, uncapping and transfer tax, Land Division Act issues

James F. Anderton V, Loomis Ewert Parsley Davis & Gotting PC, *Lansing*

Acme/11:10am/Friday
Plymouth/4:25pm/Thursday/Video Presentation

Why Buy-Sell Agreements Are Just as Important as Trust Agreements When a Trust Owns a Business Interest

unique issues arising when business interests are held in trust • what should drafters consider when drafting a buy-sell agreement for a business interest to be held in trust • why buy-sell agreements are important for fiduciaries and what to look for

Andrea C. Chomakos, Parker Poe Adams & Bernstein LLP, *Charlotte, NC*

Acme/11:45am/Friday
Plymouth/5:05pm/Thursday

Estate Planning and Divorce: Case Studies

first marriage—simple assets • second marriage—complex assets • prenuptial agreement—complex assets • devil in the details

Patricia M. Ouellette, Lowe Law Firm PC, *Okemos*

Acme/12:20pm/Friday
Plymouth/5:40pm/Thursday

Questions and Answers

Tracks

Estate Administration Track

Acme/10:35am/Saturday
Plymouth/10:35am/Friday

Marketing and Running the Successful Estate Administration Practice: Responding to Today's Challenges

why do estate administration? • top five reasons many estate planning lawyers do not do much estate administration • how to market your services in estate administration • how to handle the work efficiently and competently

Robert E. Kass, Barris Sott Denn & Driker PLLC, *Detroit*

Acme/11:10am/Saturday
Plymouth/11:15am/Friday

View from the Probate Register's Counter

how the courts handle common scenarios • court rules, forms, and more

Barbara P. Andruccioli, Oakland County Probate Court, *Pontiac (Plymouth only)*; Martha W. Irwin, Kent County Probate Register, *Grand Rapids (Acme only)*; Michael J. McClory, Wayne County Probate Court, *Detroit*

Acme/11:45am/Saturday
Plymouth/11:55am/Friday

Writings Intended as Wills

paper plates, cocktail napkins, and other writings • electronic wills and digital estate planning • electronic signatures and notarization • the changing legal landscape with Nevada leading the way

Joseph P. Buttiglieri, Kemp Klein Law Firm, *Troy*

Acme/12:20pm/Saturday
Plymouth/12:30pm/Friday

Questions and Answers

Financial Track

Acme/10:35am/Saturday

Hot Topics in Retirement Assets

employer plan options and rules • protection from creditors and predators • beneficiary blunders • Roth IRA issues

Amy N. Morrissey, Westerman & Morrissey PC, *Ann Arbor*

Acme/11:10am/Saturday

Cryptocurrency Planning: Bitcoin and Beyond

introduction to cryptocurrencies • income tax considerations • CFTC and SEC regulation • differences between cryptocurrencies and other digital assets • estate planning considerations

Carlos M. Alarcon, CFP, U.S. Trust, Bank of America Private Wealth Management, *Chicago, IL*

Acme/11:45am/Saturday

The Ins and Outs of the Prudent Investor Rule

what the rule means for trustees and trustee duties • importance of the rule for beneficiaries • the benefit of professional advice • investment and trustee fees

Nazneen S. Hasan, Dykema, *Bloomfield Hills*

Acme/12:20pm/Saturday

Questions and Answers

Real Property Track

Plymouth/10:35am/Friday

Administration of Real Estate Assets

property taxes • insurance • allocation • title issues • valuation

Drew Hayes, Plante Moran Trust, *Southfield*; Kristin Andrea Hughes, Plante Moran Trust, *Southfield*

Plymouth/11:15am/Friday

Positioning the Family Cottage for Generations

initiating the conversation • choosing the governing instrument • expecting the unexpected—and planning for it • developing the exit strategy • incorporating legacy letters

Cortney S. Danbrook, Danbrook Adams Raymound PLC, *Traverse City*

Plymouth/11:55am/Friday

Special Real Property Issues

cell towers • solar panels • wind turbines • farm leases • oil and gas leases

William L. Meengs, Jr., Stroup Meengs PC, *Petoskey*; Robert W. Parker, Parker Harvey PLC, *Traverse City*

Plymouth/12:30pm/Friday

Questions and Answers

Moderators

Real Property Track ***(Plymouth Only)***
Cortney S. Danbrook
Danbrook Adams Raymound PLC, *Traverse City*

Plenary Sessions
David P. Lucas
Vandervoort Christ & Fisher PC, *Battle Creek*

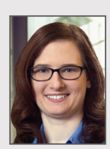
Disability Planning Track
Erin L. Majka
Chalgian & Tripp Law Offices, *Battle Creek*

Estate Administration Track
Michael J. McClory
Wayne County Probate Court, *Detroit*

Financial Track ***(Acme Only)***
Amy N. Morrissey
Westerman & Morrissey PC, *Ann Arbor*

Intersections Track
Patricia M. Ouellette
Lowe Law Firm PC, *Okemos*

Advanced Planning Track
James P. Spica
Dickinson Wright PLLC, *Detroit*



Core Concepts Track
Rebecca K. Wrock
Couzens Lansky Fealk Ellis Roeder & Lazar PC, *Farmington Hills*

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Acme Accommodations

Grand Traverse Resort & Spa

100 Grand Traverse Village Blvd., Acme, MI 49610

A block of rooms has been reserved at the Grand Traverse Resort and Spa under group code ICLE519 for May 15–18, 2019. Room rates vary. Visit www.grandtraverseresort.com to reserve a room.

Reservations must be made online by 05/01/19. Registrants are responsible for their own hotel expenses.

Plymouth Accommodations

The Inn at St. John's

44045 Five Mile Road, Plymouth, MI 48170

A block of rooms has been reserved at The Inn at St. John's, Plymouth, under ICLE for June 19–20, 2019. The room rate is $154/night. Call 734-414-0600 to reserve a room.

Reservations must be made by 05/28/19. Registrants are responsible for their own hotel expenses.

JOIN US IN ACME A DAY EARLY!

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Special Add-On Seminar

Level: Intermediate/Advanced
CLE: 2.75

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PCP PROBATE & ESTATE PLANNING CERTIFICATE PROGRAM ELECTIVE

May 15, 2019 | 2:00pm–5:00pm | Grand Traverse Resort & Spa, Acme

Embrace Technology, Gain Efficiency, and Enhance Your Profitability

Life as an estate planner is changing rapidly. Your future success depends on the steps you take today. Start transforming your practice and craft processes that fit your clients' unique needs. Reduce costs and improve workflow. Make simple adjustments to how you handle files while transitioning as much as 90 percent of your paper files to an electronic format. Use proven strategies to automate more of your practice and work at the top of your license.

Schedule

2:00pm

Transforming into a Practice of the Future

technology tools to keep you on the cutting edge • efficient document generation • ethical considerations • generating business from your ideal clients

3:00pm

Collaboration as the Future of Practice

aligning with top professionals • using a multidimensional approach to servicing clients

3:45pm

Human Aspects of Planning

blended and non-traditional families • psychology of estate planning • tangible and other property issues

4:15pm

Modern Trust Drafting and Planning

protectors • appointers • committees • charitable inclusion • SPEs • perpetual trusts • flight clauses • decanting clauses

Contributor

Martin M. Shenkman
Shenkman Law,
Fort Lee, NJ

Martin M. Shenkman, CPA, MBA, PFS, AEP, JD, is a lawyer in private practice in Fort Lee, New Jersey, and New York City. He focuses on estate and tax planning, planning for closely held businesses, and estate administration. Mr. Shenkman is a regular source for national publications, TV shows, and radio programs. He is also a prolific author, having published 42 books and more than 1,000 articles.

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59TH ANNUAL

Probate & Estate Planning *institute*

MAY 16–18, 2019 | Grand Traverse Resort & Spa, Acme
JUNE 20–21, 2019 | The Inn at St. John's, Plymouth

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4 Ways to Register

1 **Online** (with credit card) www.icle.org/probate

2 **Call** (with credit card) 877-229-4350

3 **Fax** (form with credit card) 877-229-4351

4 **Mail** (form with payment) ICLE, 1020 Greene St. Ann Arbor, MI 48109-1444

A. Personal Info

Name

MI Bar# ICLE P'ship#

Firm

Address

City State Zip

Phone Fax

E-mail

B. Institute Registration | Pick One

☐ **Acme,** 05/16–18/19 ☐ **Plymouth,** 06/20–21/19

☐ **$395** General
☐ **$365** Cosponsor Section Member
☐ **$345** ICLE Partner
☐ **$295** per Registrant (4+ Registrants from the Same Firm)[1]
☐ **$195** New Lawyer (0–3 Years in Practice P79840+)
☐ **FREE** Judges (Limit 40)[2]

19CI-6530

C. Materials Format | Institute Registrants Pick One

☐ **FREE** Electronic Materials[3]
☐ **$25** Print Handbook and Electronic Materials[3]

D. Networking Event | Optional

☐ **FREE** Institute Networking Lunch—Acme, 05/17/19
(Pre-Registration Required—Limit 90)

E. Special Add-On Seminar Registration | Optional

Building Your Future Estate Planning Practice Today
Acme, 05/15/19, 2:00pm–5:00pm

☐ **$165** Probate & Estate Planning Institute Registrant
☐ **$195** General (Not Attending the Probate & Estate Planning Institute)
☐ **$165** ICLE Partner or Cosponsor Section Member
☐ **$95** New Lawyer (0–3 Years in Practice P79840+)

19CH-6588

F. Can't Attend the Institute?

Non-Registrants—Purchase the Electronic Materials and Select Recordings.

☐ **$195** Non-ICLE Partners
☐ **$136.50** ICLE Partners

G. Payment Info | Calculate Total and Select Check/CC

Institute Registration (Box B) $________
Materials Format (Box C) $________
Special Add-On Seminar Registration (Box E) $________
Institute Materials for Non-Registrants (Box F) $________
(Add 6% MI Sales Tax to This Line Only)
Total Amount Due $________

☐ **Check** Check No. ______________ Payable to: ICLE

☐ **Visa** ☐ **Mastercard** ☐ **Amex** ☐ **Discover**

CC No. Exp. Date

Signature for CC

9BP

Prices guaranteed until 06/21/19. Cannot combine discounts. [1]Please attach additional sheet listing registrants attending. [2]Current sitting state court judges (limit 40) attend free and must complete order form or call ICLE to register. [3]Electronic materials will be posted online before the seminar. **Complete Seminar Policy:** www.icle.org/info/seminarpolicies. **Institute Cancellation Policy:** ACME: For a full refund, notify ICLE by 05/02/19. Registrants who cancel after that date will be charged a $60 cancellation fee. No refunds will be issued after 05/09/19. PLYMOUTH: For a full refund, notify ICLE by 06/06/19. Registrants who cancel after that date will be charged a $60 cancellation fee. No refunds will be issued after 06/13/19. **Special Add-On Seminar Cancellation Policy:** For a full refund, notify ICLE by 05/01/19. Registrants who cancel after that date will be charged a $60 cancellation fee. No refunds will be issued after 05/08/19. **Walk-in Registrations:** Permitted on a space-available basis or if registrants fail to claim their seat in the first 15 minutes of the seminar. **Persons with Disabilities or Dietary Restrictions:** For special arrangements please contact ICLE no later than seven days before the seminar.