



MAY 18–20, 2023 ACME or JUNE 15–16, 2023 PLYMOUTH

63RD ANNUAL

Probate & Estate Planning Institute

COSPONSOR

Probate & Estate Planning Section of the State Bar of Michigan

ADD-ON SEMINAR IN ACME

Dive deep into retirement assets with national speaker
Christopher R. Hoyt.

REGISTER TODAY

www.icle.org/probate
877-229-4350



ICLE

THE INSTITUTE OF CONTINUING LEGAL EDUCATION

The education provider of the State Bar of Michigan

The State Bar of Michigan • The University of Michigan Law School • Wayne State
University Law School • University of Detroit Mercy School of Law • Western Michigan
University Thomas M. Cooley Law School • Michigan State University College of Law

Secure Your Clients for Generations

Whether you're a seasoned or new estate planner, local and national experts have you covered on everything from navigating retirement assets to saving time with technology. Get critical caselaw, legislative, and Medicaid updates. Catch up with colleagues and take away strategies you can immediately apply to your practice—no matter if you join us in Acme or Plymouth.

The Best Speakers—from Michigan and Beyond

You won't find a lineup of presenters like this anywhere else. Here are just a few of the experts you will hear from:



Nancy H. Welber
Nancy H. Welber PC, *Farmington Hills*

Nancy has been a lawyer in private practice for more than 40 years and is also a CPA. She breaks down everything you need to know about retirement assets and SNTs.



Christopher R. Hoyt
University of Missouri (Kansas) School of Law,
Kansas City, MO

Chris is a professor of law at the university, where he teaches courses in areas such as federal income taxation and charitable organizations. He provides expert insight on retirement assets.



Barron K. Henley
Affinity Consulting Group, *Columbus, OH*

Barron is a nationally recognized speaker with expertise in law practice management and document automation. He shares tech tips for estate planners that will help you streamline your practice.



Terrence G. Quinn
The TGQ Law Firm, *Ann Arbor*

Terrence is not only a premier Michigan estate planning, probate, and elder law practitioner, but a sought-after national speaker as well. He shares secrets on creating a successful business plan.



Christine M. Savage
Lowe Law Firm PC, *Okemos*

Chris is a shareholder in the firm. She also holds degrees in accounting and taxation. She walks you through the administration side of trustee and PR duties.



Mark K. Harder
Warner Norcross + Judd LLP, *Holland*

Mark has more than 30 years of experience and served as reporter for the Michigan Trust Code Committee. He helps you avoid mistakes when dealing with cottages.



Kathleen Hogan Aguilar
Rhoades McKee PC, *Grand Rapids*

Katie's an experienced estate planner. But it's her specialization in several niche areas that sets her apart. She keeps you current with the latest on Medicaid, elder law, and disability.

“ The material is relevant, up to date, and the presenters are always on their game. ”

- Raj A. Malviya, Miller Johnson, *Grand Rapids*

Trusted Advice to Improve Your Practice

Your clients turn to you for trusted guidance. When you need expert advice yourself, this is the place. It's your best opportunity this year to get a wealth of insight on timely topics—from names you know and trust.

Retirement Assets

Tackle tricky retirement issues with confidence. National speaker Chris Hoyt and Michigan's own Nancy Welber help you navigate this evolving area. Sort through complexities arising from the SECURE Act. Gain best practices for handling accounts in a blended family. Understand see-through trust rules and properly move assets to a special needs beneficiary.

Controversial Issues

Better understand Lady Bird deeds, no-contest clauses, co-patient advocates, co-trustees acting independently, and more. Doug Mielock takes you on an entertaining journey through the top 10 controversial estate planning issues.

Technology Tips

All tech tips aren't created equal. Barron Henley knows what estate planners need and curates the best guidance in three different sessions. Reduce paper, automate your documents, and streamline your practice. He covers everything from how to save time with subscription drafting systems to properly using PDFs for critical functions like redacting.

Postpandemic Practice

Terrence Quinn started his firm during the 2008 recession and continued to grow it despite the pandemic. He knows what it takes to succeed amid adversity. Get tips on how to develop and stick with a business plan that delivers results.

Advanced Medical Directives

Get two important perspectives as a health care lawyer and doctor walk you through the complexities. Draft airtight advance medical directives (AMDs) and know how to identify a surrogate decision maker in the absence of an AMD.

Real Estate Track (Acme Only)

Mark Harder prepares you for the unexpected when dealing with family cottages. Melisa Mysliwiec breaks down common and unresolved issues in uncapping. David Lucas covers fiduciary responsibilities for real property.

Acme Agenda

CLE: Up to 12.25* CTFA: Pending** LEVEL: Basic/Intermediate/Advanced

THURSDAY, MAY 18, 2023



- 12:00pm Registration and Vendor Showcase
- 1:00pm Welcoming Remarks and Announcements
- 1:30pm Planning for Inherited Retirement Accounts in 2023
- 2:30pm Caselaw Update
- 3:15pm Networking Break

Advanced Planning Track

- 3:30pm The 10 Most Controversial Issues in Michigan Estate Planning Law
- 4:15pm So You Wanna Be a Philanthropist?
- 5:00pm Questions and Answers

Core Concepts Track

- Advance Directives and Surrogate Decision-Making
- Handling Small Estates
- Questions and Answers

- 6:00pm Networking Reception

FRIDAY, MAY 19, 2023

- 7:30am Registration, Continental Breakfast, and Vendor Showcase
- 8:10am Remarks from the State Bar Executive Director
- 8:30am Postpandemic Perspectives on Powering Your Probate Practice
- 9:30am Networking Break

Business Planning Track

- 9:45am Trustee and PR Duties with Professional Business Entities: Planning
- 10:25am Trustee and PR Duties with Professional Business Entities: Administration
- 11:05am Estate Planning for the Cannabis Business
- 11:45am Questions and Answers

Disability Planning Track

- Medicaid, Elder Law, and Disability Update 2023
- Drafting Special Needs Trusts
- Retirement Assets and Special Needs Trusts
- Questions and Answers

- 12:00pm Networking Lunch on Premises (Preregistration Required—Limit 100)

Special Advanced Session

- 1:30pm The Relation Back of Powers

Special Basic Session

- New Lawyers, You Have the Floor

*No CLE credit is given for the Acme special session "New Lawyers, You Have the Floor." **The *Probate & Estate Planning Institute, 63rd Annual*, will be submitted to ABA Professional Certifications for CE credit review and approval 90 days prior to the event.

Acme Agenda

SATURDAY, MAY 20, 2023

- 7:30am Registration, Continental Breakfast, and Vendor Showcase
 8:30am Legislative Update
 9:15am Take the Work Out of Your Workflow: An Estate Planning Case Study
 10:15am Networking Break

	Law and Tech Track	Real Estate Track
10:30am	Subscription Drafting Systems Versus Automating Your Own Documents ¹	Cottages: LLC Versus Trust Versus Co-Tenancies ¹
11:00am	PDF Files and Programs: What Every Estates and Trusts Lawyer Should Know ¹	Uncapping: Common and Unresolved Issues ¹
11:30am	Everything You Must Know about the Omnibus EPIC Changes and DPOA Act ¹	Fiduciary Responsibilities for Real Property ¹
12:00pm	Questions and Answers	Questions and Answers

¹MP3 download available to all registrants after the seminar.

Acme Special Sessions

Acme/1:30pm/Friday

The Relation Back of Powers (*Advanced*)

Resulting trusts; tax and nontax aspects of express trusts; conflict of laws.

James P. Spica, Chalgian & Tripp Law Offices, *Southfield*

Acme/1:30pm/Friday

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

Ask your practice management and substantive questions in this open forum.

Jennifer N. Cleaver, North Pointe Legal PLLC, *Ludington*; Warren H. Krueger, III, Foster Swift Collins & Smith PC, *Lansing*; David D. Sprague, Old National Bank, *Ann Arbor*

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! (2% major event savings is limited to one event per year.)

Learn more: www.icle.org/cna

PLATINUM SPONSORS



AYAR LAW

Tax problems—resolved

Community Foundation

FOR SOUTHEAST MICHIGAN

Plymouth Agenda

CLE: 10 CTFA: Pending* LEVEL: Basic/Intermediate/Advanced

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

THURSDAY, JUNE 15, 2023

8:30am Welcoming Remarks and Announcements

8:50am Planning for Inherited Retirement Accounts in 2023 (Video Presentation)

9:50am Caselaw Update

10:35am Networking Break



Advanced Planning Track

10:50am	The 10 Most Controversial Issues in Michigan Estate Planning Law
11:40am	So You Wanna Be a Philanthropist? (Video Presentation)
12:25pm	Questions and Answers

Core Concepts Track

Advance Directives and Surrogate Decision-Making
Handling Small Estates
Questions and Answers

12:35pm Networking Lunch on Premises

1:50pm Postpandemic Perspectives on Powering Your Probate Practice

2:50pm Networking Break

Business Planning Track

3:05pm	Trustee and PR Duties with Professional Business Entities: Planning
3:50pm	Trustee and PR Duties with Professional Business Entities: Administration
4:40pm	Estate Planning for the Cannabis Business
5:10pm	Questions and Answers

Disability Planning Track

Medicaid, Elder Law, and Disability Update 2023
Drafting Special Needs Trusts
Retirement Assets and Special Needs Trusts
Questions and Answers

5:20pm Networking Reception

FRIDAY, JUNE 16, 2023

8:30am Legislative Update

9:15am Take the Work Out of Your Workflow: An Estate Planning Case Study

10:15am Networking Break

Law and Tech Track

10:30am	Subscription Drafting Systems Versus Automating Your Own Documents ¹
11:05am	PDF Files and Programs: What Every Estates and Trusts Lawyer Should Know ¹
11:40am	Everything You Must Know about the Omnibus EPIC Changes and DPOA Act ¹
12:10pm	Questions and Answers

Administration Track

Administering the Divorced Decedent's Estate ¹
Firearms in an Estate ¹
Advice from the Probate Register ¹
Questions and Answers

*The Probate & Estate Planning Institute, 63rd Annual, will be submitted to ABA Professional Certifications for CE credit review and approval 90 days prior to the event.

¹MP3 download available to all registrants after the seminar.

Plenary Sessions: Acme and Plymouth

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

Welcoming Remarks and Announcements

Hear from the current president of the State Bar of Michigan as well as the chairperson of the Probate & Estate Planning Section.

James W. Heath, Wayne County Corporation Counsel, *Detroit* (Acme only);
Mark E. Kellogg, Fraser Trebilcock, *Lansing*

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

Planning for Inherited Retirement Accounts in 2023

The rules and planning implications for liquidating inherited retirement accounts in light of the 2022 regulations and the SECURE Act legislation; steps to take if a trust will be named as the beneficiary of an account; the best way to deal with retirement accounts in a blended family when there is a second spouse and children from a prior marriage.

Christopher R. Hoyt, University of Missouri (Kansas City) School of Law, *Kansas City, MO*

Acme/2:30pm/Thursday
Plymouth/9:50am/Thursday

Caselaw Update

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

Acme/6:00pm/Thursday
Plymouth/5:20pm/Thursday

Networking Reception

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

Acme/8:10am/Friday

Remarks from the State Bar Executive Director

Hear from the executive director of the State Bar of Michigan.

Peter Cunningham, State Bar of Michigan, *Lansing*

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

Postpandemic Perspectives on Powering Your Probate Practice

Consider your current practice and business and where you want to be; impacts of the pandemic on marketing (if any); dynamic branding interactions even in unexpected locations; review key factors of your business plan and take a peek inside Terrence's.

Terrence G. Quinn, The TGQ Law Firm, *Ann Arbor*

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/9:15am/Saturday
Plymouth/9:15am/Friday

Take the Work Out of Your Workflow: An Estate Planning Case Study

Identifying inefficient processes in your office; improving your bottom line with process mapping; the disconnect between what a lawyer thinks is happening and what is actually happening; walk through a real-life example where small adjustments made big differences for an estates and trusts practice.

Barron K. Henley, Affinity Consulting Group, *Columbus, OH*

Acme/12:00pm/Friday
Plymouth/12:35pm/Thursday

Networking Lunch on Premises

Enjoy lunch with colleagues and share your thoughts on the institute's most thought-provoking topics.

(Preregistration Required in Acme—Limit 100)

Tailor the Trip That Works for You

Enjoy an extended getaway in Acme in May. Or spend less time out of the office with a quick trip to Plymouth in June.

Something for Everyone

If you can attend only one event each year to stay current, look no further. This event delivers the most comprehensive content for Michigan lawyers of all experience levels.

Newer to Estate Planning

- Draft airtight advance medical directives (AMDs) and special needs trusts
- Use streamlined processes when administering small estates
- Save time using subscription drafting systems or document automation
- Get your questions answered in a session just for new lawyers
- Master the uncapping rules when a property is transferred

Advanced Estate Planners

- Better understand controversial issues like Lady Bird deeds and no-contest clauses
- Help philanthropic clients make the right cost-benefit choices
- Review where your practice is at in the postpandemic world—and create a new business plan
- Gain tax-saving strategies and avoid traps with a deeper dive into retirement issues
- Grasp special regulatory rules when the owner of a cannabis business dies

Tracks

Administration Track

Plymouth/10:30am/Friday

Administering the Divorced Decedent's Estate

What to do when the decedent died during a divorce; determining if a separated spouse, or a spouse during the pendency of a divorce, is entitled to a spouse's intestate share, spousal allowances, or priority of appointment as personal representative; what to do when an ex-spouse was not removed as a beneficiary of an account or life insurance policy or was named a personal representative, trustee, or devisee.

Richard C. Mills, Marcoux Allen PC, *Jackson*

Plymouth/11:05am/Friday

Firearms in an Estate

What to do when you have firearms in an estate; safe handling of firearms; inventorying firearms; transfer of firearms and background checks; options for selling firearms.

Kelly L. O'Connor, O'Connor & Bennett Law Firm PLC, *Marshall*

Plymouth/11:40am/Friday

Advice from the Probate Register

Filing options/protocol (and MiFILE update); court form utilization tips; PII and electronic files; court rule update (Zoom/video hearings here to stay); traps for the unwary; miscellaneous probate pointers.

Jennifer B. Parmalee, Wayne County Probate Court, *Detroit*

Plymouth/12:10pm/Friday

Questions and Answers

Advanced Planning Track

Acme/3:30pm/Thursday
Plymouth/10:50am/Thursday

The 10 Most Controversial Issues in Michigan Estate Planning Law

Lady Bird deeds; co-patient advocates; co-trustees acting independently; acknowledgment by agent under power of attorney; providing copy of trust instrument to beneficiaries; no-contest clauses.

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

Acme/4:15pm/Thursday
Plymouth/11:40am/Thursday/Video Presentation

So You Wanna Be a Philanthropist?

Cost-benefit choices for the philanthropist when choosing between a private foundation, a supporting organization, or a donor-advised fund; legal, tax, and administrative advantages and disadvantages of each philanthropic vehicle; proposed rules that permit donor-advised funds to satisfy legally binding pledges.

Christopher R. Hoyt, University of Missouri (Kansas City) School of Law, *Kansas City, MO*

Acme/5:00pm/Thursday
Plymouth/12:25pm/Thursday

Questions and Answers

Business Planning Track

Acme/9:45am/Friday
Plymouth/3:05pm/Thursday

Trustee and PR Duties with Professional Business Entities: Planning

Learned profession restrictions; dealing with heightened confidentiality requirements; nuances of planning for professionals.

Nicholas A. Reister, Smith Haughey Rice & Roegge, *Holland*

Acme/10:25am/Friday
Plymouth/3:50pm/Thursday

Trustee and PR Duties with Professional Business Entities: Administration

Trust/estate business assets; LLC statute; QSSTs (Qualified Subchapter S Trusts); ESBTs (Electing Small Business Trusts); administration and accounting; tax reporting.

Christine M. Savage, Lowe Law Firm PC, *Okemos*

Acme/11:05am/Friday
Plymouth/4:40pm/Thursday

Estate Planning for the Cannabis Business

Introduction to Cannabis Regulatory Agency disclosure requirements; learn drafting techniques for compliant structural safeguards and best practices for cannabis businesses; understand regulatory reporting obligations and administration upon death or incapacity; discussion of estate and

GOLD SPONSORS



PROBATE & ESTATE
PLANNING SECTION

Tracks

gift tax considerations for cannabis business valuations.

John W. Fraser, Dykema, *Lansing*; Molly P. Petitjean, Buhl Little Lynwood & Harris PLC, *East Lansing*

Acme/11:45pm/Friday
Plymouth/5:10pm/Thursday

Questions and Answers

Core Concepts Track

Acme/3:30pm/Thursday
Plymouth/10:50am/Thursday

Advance Directives and Surrogate Decision-Making

Review the distinction between and relevance of capacity determination and legal competency; the processes and challenges in identifying medical surrogate decision makers in the absence of advance medical directives (AMD); the limitations and clinical utility of AMD content; recommendations and considerations for enhancing meaning and utility of AMD in clinical practice.

Roman A. Barraza, MD, Munson Healthcare, *Traverse City*; Rachel Brochert Roe, Munson Healthcare, *Traverse City*

Acme/4:15pm/Thursday
Plymouth/11:40am/Thursday

Handling Small Estates

Affidavit of decedent successor; petition/order for assignment; summary administration/SOS to transfer vehicle.

A. Michelle Lane, Chalgian & Tripp Law Offices, *East Lansing*

Acme/5:00pm/Thursday
Plymouth/12:25pm/Thursday

Questions and Answers

Disability Planning Track

Acme/9:45am/Friday
Plymouth/3:05pm/Thursday

Medicaid, Elder Law, and

Disability Update 2023

Michigan and federal developments; updated and effective planning techniques; special needs strategies.

Kathleen Hogan Aguilar, Rhoades McKee PC, *Grand Rapids*

Acme/10:25am/Friday
Plymouth/3:50pm/Thursday

Drafting Special Needs Trusts

Identify need for a third-party trust versus first-party trust; incorporate pooled trusts or ABLE accounts; provide for proper distributions.

Jacquelyn Rygiel-Sprague, Rygiel Sprague PC, *Ann Arbor*

Acme/11:05am/Friday
Plymouth/4:40pm/Thursday

Retirement Assets and Special Needs Trusts

See-through trust rules; how to get retirement assets to a special needs beneficiary or to a supplemental needs trust under the SECURE Act.

Nancy H. Welber, Nancy H. Welber PC, *Farmington Hills*

Acme/11:45am/Friday
Plymouth/5:10pm/Thursday

Questions and Answers

Law and Tech Track

Acme/10:30am/Saturday
Plymouth/10:30am/Friday

Subscription Drafting Systems Versus Automating Your Own Documents

The top subscription drafting systems available to estates and trusts lawyers; automating your own documents using built-in word processor functionality or moving to a document assembly platform such as HotDocs or HighQ; the pros, cons, costs, and benefits of each approach so you can

Moderators



Core Concepts Track

A. Michelle Lane
Chalgian & Tripp Law Offices, *East Lansing*



Plenary Sessions

Katie Lynwood
Buhl Little Lynwood & Harris PLC, *East Lansing*



Advanced Planning Track

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



Administration Track (Plymouth Only)

Richard C. Mills
Marcoux Allen PC, *Jackson*



Real Estate Track (Acme Only)

Melisa M. W. Mysliwiec
Fraser Trebilcock, *Grand Rapids*



Law and Tech Track

Nathan R. Piwowarski
McCurdy Wotila & Porteous PC, *Cadillac*



Disability Planning Track

Jacquelyn Rygiel-Sprague
Rygiel Sprague PC, *Ann Arbor*



Business Planning Track

Christine M. Savage
Lowe Law Firm PC, *Okemos*

Tracks

make an informed decision about the best way forward for your office.

Barron K. Henley, Affinity Consulting Group, *Columbus, OH*

Acme/11:00am/Saturday
Plymouth/11:05am/Friday

PDF Files and Programs: What Every Estates and Trusts Lawyer Should Know

Why everyone in your office needs to understand the risks and benefits of PDF files; using PDFs to reduce paper; important tools like redaction, metadata removal and electronic document security, Bates Numbering, splitting/combining PDFs, reducing file-size for electronic case filing, review/comment and PDF collaboration, adding signatures and stamps, routing PDFs for comments/feedback, and more; choosing the right program to perform these functions (you are not limited to Adobe Acrobat).

Barron K. Henley, Affinity Consulting Group, *Columbus, OH*

Acme/11:30am/Saturday
Plymouth/11:40am/Friday

Everything You Must Know about the Omnibus EPIC Changes and DPOA Act

Use EPIC's new standby guardian tools; leverage-improved nonprobate transfer provisions; use new "silent trust" rules; get third parties to accept DPOAs; understand the statutory model DPOA; explore new drafting options under the Act.

Nathan R. Piwowarski, McCurdy Wotila & Porteous PC, *Cadillac*

Acme/12:00pm/Saturday
Plymouth/12:10pm/Friday

Questions and Answers

Real Estate Track

Acme/10:30am/Saturday

Cottages: LLC Versus Trust Versus Co-Tenancies

Choice of entity; operational issues; developing the exit strategy; expecting the unexpected—and planning for it.

Mark K. Harder, Warner Norcross + Judd LLP, *Holland*

Acme/11:00am/Saturday

Uncapping: Common and Unresolved Issues

Overview of uncapping; transfer of ownership; transfer of ownership exemptions; what's missing; common and unresolved issues.

Melisa M. W. Mysliwiec, Fraser Trebilcock, *Grand Rapids*

Acme/11:30am/Saturday

Fiduciary Responsibilities for Real Property

Authority; administration of real estate; necessary approvals; action by fiduciary such as trustee, guardian, conservator, personal representative; financial power of attorney; protective orders; conveyances and post-conveyance steps.

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

Acme/12:00pm/Saturday

Questions and Answers

Special Add-On Seminar

Join Us in Acme a Day Early In-Depth Retirement Asset Planning

May 17, 2023 | Acme | 2:00pm-5:00pm | www.icle.org/retirement

Be among the first to get advice from our distinguished national speaker. Professor Christopher R. Hoyt delivers an in-depth analysis of situations that estate planners commonly face with clients who have large amounts of retirement assets. Learn optimal planning strategies to get the best tax outcomes with the least amount of complexity.

Level: Intermediate/Advanced
CLE: 2.75

Cosponsored by the Probate & Estate Planning Section of the State Bar of Michigan



PROBATE & ESTATE PLANNING
CERTIFICATE PROGRAM ELECTIVE



Speaker

Christopher R. Hoyt
University of Missouri
(Kansas) School of Law,
Kansas City, MO

SAVE \$30 by registering for the institute and this seminar at the same time.

Things to Do in Acme



GOLF

Special rates at championship courses.

The Bear

\$80 midweek | \$95 weekend
\$60 twilight

The Wolverine

\$80 midweek | \$95 weekend
\$60 twilight

Spruce Run

\$55 midweek | \$60 weekend
\$40 twilight

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

Pricing is for 18 holes. Contact resort for 9-hole rates. Mention ICLE for discounted rates. Twilight begins at 3:00pm.



SPA

10% off spa treatments.

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.



TOURS

Two ways to explore.

Bicycling

Free—all roads, no trails! Choose a 30-mile or 13-mile ride led by the Cherry Capital Cycling Club. Both courses wind along Grand Traverse Bay on the scenic Old Mission Peninsula.

Microbrewery Tour

Enjoy a group outing to local microbreweries.

Please preregister during online checkout for the bicycling and microbrewery tours. Or complete order form on back cover.

Acme Accommodations

Grand Traverse Resort & Spa

100 Grand Traverse Village Boulevard, Acme, MI 49610

A block of rooms has been reserved at Grand Traverse Resort & Spa in Acme under group code ICLE523 for 05/16-20/23. Please call 800-968-7352 to reserve a room. Reservations must be made by 04/16/23.

Registrants are responsible for their own hotel expenses.

Plymouth Accommodations

Saint John's Resort

44045 Five Mile Road, Plymouth, MI 48170

A block of rooms has been reserved at Saint John's Resort in Plymouth under group code IC061423A for 06/14-16/23. Visit www.icle.org/probate/hotel-plymouth or call 734-414-0600 and mention ICLE's *Probate & Estate Planning Institute* to reserve a room. Reservations must be made by 05/31/23.

Registrants are responsible for their own hotel expenses.

SILVER SPONSORS



63RD ANNUAL

Probate & Estate Planning Institute

MAY 18–20, 2023 | Grand Traverse Resort & Spa, Acme

JUNE 15–16, 2023 | Saint John's Resort, Plymouth



PROBATE & ESTATE PLANNING
CERTIFICATE PROGRAM ELECTIVE



THE UNIVERSITY OF MICHIGAN
INSTITUTE OF CONTINUING LEGAL EDUCATION
1020 Greene Street
Ann Arbor, MI 48109-1444

NONPROFIT ORG
U.S. POSTAGE
PAID
ANN ARBOR, MI
PERMIT NO. 106

ADDRESS SERVICE REQUESTED

Register today! www.icle.org/probate

A. Personal Info

Name		
MI Bar#	ICLE P'ship#	
Firm		
Address		
City	State	Zip
Phone	Fax	
Email		

B. Institute Registration | Pick One

☐ Acme, 05/18–20/23 ☐ Plymouth, 06/15–16/23

- ☐ \$395 General
☐ \$365 Cosponsor Section Member
☐ \$345 ICLE Partner
☐ \$195 New Lawyer (0–3 Years in Practice P83610+)
☐ \$295 per Registrant (4+ Registrants from the Same Firm)¹

Special Registration

☐ FREE Judges (Limit 40)²

23CI-6530

C. Add-On Seminar Registration | Optional

Acme, 05/17/23, 2:00pm–5:00pm

In-Depth Retirement Asset Planning

- ☐ \$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 P83610+)

23CH-6588

D. Networking Events—Acme | Optional

All activities 05/19/23; space is limited; preregistration required.

- ☐ FREE Institute Networking Lunch, 12:00pm–1:15pm
☐ FREE Bike Tour, 2:00pm–4:30pm
☐ \$25 Institute Registrant Microbrewery Tour, 12:45pm–5:15pm
☐ \$25 Each Additional Guest Microbrewery Tour, 12:45pm–5:15pm

E. Materials Format for Institute Registrants | Pick One

- ☐ FREE Electronic Materials
☐ \$35 Print Handbook³ and Electronic Materials

F. Can't Attend the Institute?

Non-Registrants—Purchase the Electronic Materials

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

G. Payment Info

Institute Registration (Box B) \$ _____

Add-On Seminar Registration (Optional, Box C) \$ _____

Networking Events—Acme (Optional, Box D) \$ _____

Institute Registrants: Add \$35 for
Print Handbook (Optional, Box E) \$ _____

Institute Materials for Non-Registrants (Box F)
(Add 6% MI Sales Tax to This Line Only) \$ _____

Total Amount Due \$ _____

Please make your payment online with credit card:
www.icle.org/probate

Alternate payment options:

If you are unable to make your credit card payment online, please call ICLE to process: 877-229-4350. If you need to pay by check, please mail form with payment to: PO Box 1343, Ann Arbor, MI 48106

Check No. _____ Payable to: ICLE

Prices guaranteed until 06/16/23. Cannot combine discounts. ¹Please attach additional sheet listing registrants attending. All registrations must be submitted and paid for at the same time. ²Current sitting state court judges (limit 40) attend free and must call ICLE or submit order form to register. ³Limit one print handbook purchase per registrant. Print handbooks are nonrefundable after the event cancellation date. **Complete Seminar Policies:** www.icle.org/info/seminarpolicies. **Acme Cancellation Policy:** For a full refund, notify ICLE by 05/04/23. Registrants who cancel after that date will be charged a \$60 cancellation fee. No refunds will be issued after 05/11/23. **Plymouth Cancellation Policy:** For a full refund, notify ICLE by 06/01/23. Registrants who cancel after that date will be charged a \$60 cancellation fee. No refunds will be issued after 06/08/23. **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.