

ABCs of Decedents' Estate Administration

Oregon's leading program on the estate administration process. This seminar is designed to help you guide your client and your case through the complete process, from non-probate alternatives to formal probate estate administration. Our faculty of experienced practitioners and judges will take you through the options and provide assistance in determining the right choice for an array of situations.

What previous attendees have said about this seminar:

"Very informative and well presented."

"Course materials were fantastic! Great forms, great outlines."

"I deeply appreciate the step-by-step discussion of the probate process."



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the Bar*

LIVE PRESENTATION
April 24, 2015

Ambridge Event Center
1333 NE MLK Jr. Blvd.
Portland, OR

5.5 General and
1 Ethics MCLE Credits

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MARK M. WILLIAMS
Program Planner
Gaydos Churnside & Balthrop PC

Program Schedule

8:15 a.m. CHECK-IN AND CONTINENTAL BREAKFAST

8:45–9:15 **Alternatives to Probate – Erin K. MacDonald**

- The “how to,” “when to,” and “why” or “why not” of avoiding probate
- Various ways of avoiding probate and the appropriateness of using those alternatives

9:15–9:45 **Initiating Probate – Timothy Marble**

- Establishing the attorney-client relationship
- Assets, venue, jurisdiction, and tax considerations
- Will or no will
- Bonding and asset restriction
- Initial petition, notices, and limited judgment

9:45–10:15 **Inventory, Collection, and Management of Assets – Jonathan A. Levy**

- How to determine when possession and control is or is not necessary
- When an appraisal is desirable
- When to delegate
- Investment responsibilities

10:15–10:30 BREAK

10:30–11:00 **Title Problems – Alan K. Brickley**

- Small estates and trusts
- PR deeds
- Affidavits of heirships

11:00–11:30 **Creditors' Claims – Jeffrey M. Cheyne, Rajkiran “Kiran” Uppal**

- Forms and information you need to deal with creditors' claims against the estate
- What do your clients need to give you to alert you to claims?
- What is the best way to formally and informally handle claims?

11:30–12:00 **Closing and Distribution of Assets – Richard A. Pagnano**

- How to complete the final account to the satisfaction of your client, the court, and all estate beneficiaries
- How to properly request attorney and fiduciary fees
- How to accomplish closing and distribution of the estate and discharge of the personal representative
- Tips on accounting for and closing an insolvent estate

12:00–1:15 LUNCH (on your own)

1:15–2:15 **View from the Probate Bench – Hon. Claudia M. Burton, Hon. Lauren S. Holland, Hon. Katherine E. Tennyson**

Written questions in advance of the CLE are encouraged. The judges will share their current concerns and tips and discuss the following issues, among others:

- Attorney fees
- Attorney's duty to the court in any probate proceeding
- Sealing information in a probate proceeding
- Restriction of assets—what, when, who, and how
- Partial distributions from an estate
- ADR in probate cases
- Impact of budget cuts on processing probate cases

2:15–3:15 **Administration of Estates with Revocable Trusts – Brian M. Thompson**

- Coordination with probate
- Selected taxation issues
- Accounting and closing
- Gun trusts

3:15–3:30 BREAK

3:30–4:30 **Utilizing Paralegals Ethically – Steven B. Taylor**

- Avoiding unlawful practice of law by staff
- Maintaining confidentiality
- Billing, compensation, and solicitation practices

4:30 p.m. ADJOURN

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Program Products

Even if you cannot attend, you can still get the program on CDs or DVDs. Use the order form in this brochure to order your set today! OLI Annual Pass holders may purchase the products at 50% off the full retail price.

Questions?

Please call OLI at (503) 768-6580 in Portland or toll-free in Oregon at (800) 222-8213, e-mail us at oli@lclark.edu, or visit our website at <http://go.lclark.edu/oli>.

Registration/Order Form

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Please "✓" appropriate box below:

TUITION: Registration includes electronic course materials. Printed materials are available for an additional \$15. (A link to a PDF of the materials will be emailed prior to the seminar date.)

EARLY REGISTRATION (*received by April 20, 2015*):

- ☐ **\$189** Early registration
- ☐ **\$139** New attorneys (admitted 2013-2015) and legal staff
- ☐ **\$95** Legal aid attorneys
- ☐ **\$15** OLI Passholder (OLI Pass No. _____), law students, and Oregon judges and their lawyer staff
- ☐ **\$15** Attorneys attending with their Mentor from an approved Bar Mentor Program (call OLI or go to <http://go.lclark.edu/oli> for details). Mentor's name: _____
- ☐ **\$15** Print materials
- ☐ **\$20** Forms on CD (*\$10 for OLI Passholders*)
- ☐ **\$20** *Add to above tuition if registration received after April 20, 2015*

LIVE WEBCAST REGISTRATION: Can't attend in person? OLI offers a simultaneous live webcast option allowing you to "attend" the program from the convenience of your office. This program will be broadcast LIVE online on Friday, April 24, 2015, starting at 8:45 a.m. Pacific Time. You may access this event from anywhere with an established internet connection. The webcast will include video and audio of the speakers and seminar handout materials. To register for the live webcast, please go to our website at <http://go.lclark.edu/oli> and click on "Webcasts."

DVDs, CDs, AND COURSE BOOKS:

I am unable to attend. Please send me:

- ☐ **\$209** Audio CDs and print course book
- ☐ **\$309** DVDs and print course book
- ☐ **\$59** Print course book only
- ☐ **\$20** \$20 Forms on CD (*available only with course book purchase*)
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- ☐ **\$9.00 Note: Add \$9.00 shipping and handling fee to above product orders.**

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CONFIRMATION: Confirmation will be sent via e-mail.

CANCELLATION POLICY: Tuition minus a \$20 handling charge will be refunded if the cancellation request is *written and received* by Monday, April 20, 2015.

NEED ASSISTANCE: If you are a person with a disability, please let OLI know in time to make any necessary accommodations for you.

TUITION ASSISTANCE: A limited number of scholarships are available based on financial need. Contact OLI.

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5.5 General and 1 Ethics MCLE Credits

April 24, 2015

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