



Oregon Law Institute
of Lewis & Clark Law School

ABCs of Decedents' Estate Administration

This program is designed to help you guide your client and your case through the estate administration 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.

From the basics to useful practice tips from experts, this program will help de-mystify the processes of estate administration and assist you in providing efficient and effective counsel.

**Friday,
March 16, 2012**

**Oregon Convention Center
777 NE Martin Luther King Jr. Blvd.
Portland, Oregon**

**6.75 General or Practical Skills
MCLE Credits**

SCHEDULE

8:00 a.m.	LATE REGISTRATION AND DISTRIBUTION OF MATERIALS
8:30–9:00	Essential Technology in a Probate Practice <ul style="list-style-type: none">■ The hardware and software you can't live without■ Time and money: Timekeeping/billing/bookkeeping■ Managing the transition to less paper■ Down-to-earth cloud computing – <i>Sheila M. Blackford</i>
9:00–9:30	Alternatives to Probate <ul style="list-style-type: none">■ 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 – <i>Brent S. Kinkade</i>
9:30–10:00	Initiating Probate <ul style="list-style-type: none">■ 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 – <i>Timothy Marble</i>
10:00–10:15	BREAK
10:15–10:45	Inventory, Collection, and Management of Assets <ul style="list-style-type: none">■ How to determine when possession and control is or is not necessary■ When an appraisal is desirable■ When to delegate■ Investment responsibilities – <i>Jonathan A. Levy</i>
10:45–11:15	Title Problems <ul style="list-style-type: none">■ Small estates and trusts■ PR deeds■ Affidavits of heirships – <i>Alan K. Brickley</i>
11:15–11:45	Creditors' Claims <ul style="list-style-type: none">■ 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? – <i>Victoria D. Blachly</i> – <i>Eric J. Wieland</i>
11:45–12:15	Closing and Distribution of Assets <ul style="list-style-type: none">■ 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 – <i>Richard A. Pagnano</i>
12:15–1:30	LUNCH (on your own)

SCHEDULE (cont.)

1:30–2:30

View from the Probate Bench

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:

- How budget cuts are affecting how the courts are processing probate cases
- 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

Moderator: *Hon. Rita Batz Cobb*

– *Hon. Claudia M. Burton*

– *Hon. Robert D. Herndon*

– *Hon. Lauren S. Holland*

– *Hon. Katherine E. Tennyson*

2:30–2:45

BREAK

2:45–3:30

Administration of Estates with Revocable Trusts

- Coordination with probate
 - Selected taxation issues
 - Accounting and closing
- *Brian M. Thompson*

3:30–4:30

Taxing Thoughts About Non-Taxable Estates

- Really non-taxable?
 - Income, property, and other taxes
 - Incorporating tax issues into probate process
 - Commonly encountered trust tax issues
- *Gwendolyn Griffith*

4:30 p.m.

ADJOURN

Forms on CD

The forms included in the course book are available on a CD in Word and WordPerfect for an additional \$20. Available only with program attendance or book/CD/DVD purchase.



FACULTY

Victoria D. Blachly

Samuels Yoelin Kantor LLP

Sheila M. Blackford

*Practice Management Advisor,
Professional Liability Fund*

Alan K. Brickley

*Counsel, First American Title
Insurance Company of Oregon*

Hon. Claudia M. Burton

Marion County Circuit Court

Hon. Rita Batz Cobb

*Washington County
Presiding Probate Judge*

Gwendolyn Griffith

Tonkon Torp LLP

Hon. Robert D. Herndon

Clackamas County Circuit Court

Hon. Lauren S. Holland

Lane County Circuit Court

Brent S. Kinkade

Karnopp Petersen LLP

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Richard A. Pagnano

*Davis Pagnano McNeil & Vigna LLP,
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Hon. Katherine E. Tennyson

*Multnomah County
Presiding Probate Judge*

Brian M. Thompson

Law Office of Brian M. Thompson

Eric J. Wieland

Samuels Yoelin Kantor LLP

Mark M. Williams

*Program Planner
Gaydos, Churnside & Balthrop PC*

LIVE PRESENTATION

Portland – 3/16/12

Oregon Convention Center
777 NE MLK Jr. Blvd.

MCLE CREDIT

ABCs of Decedents' Estate Administration
will receive **6.75** General or Practical
Skills MCLE credits.

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 Passholders may purchase OLI program 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>.

VIDEO REPLAYS

Please register at least one week prior to the replay date.

Bend – 3/30/12**Replay 8:30 a.m.**

Bryant Lovlien & Jarvis
591 Mill View Way

Eugene – 3/23/12**Replay 8:30 a.m.**

Harrang Long Gary & Rudnick PC
360 East 10th Avenue, Ste. 300

Portland – 4/4/12**Replay 9:00 a.m.**

Oregon Law Institute
Gus J. Solomon Courthouse
620 SW Main Street, Ste. 706

ABCs of Decedents' Estate Administration

Friday, March 16, 2012

Name

OSB No. or Profession

Firm/Organization

Street Address

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E-Mail

Please "✓" appropriate box below:

☐ Live presentation

☐ Video replay. Location: _____ Date: _____

Please register at least one week prior to the replay date.

TUITION

(Prices apply to live and video replays.)

☐ **\$179** Early registration (*received by March 12, 2012*)

☐ **\$139** New attorneys (admitted 2009–2011) and legal staff (*received by March 12, 2012*)

☐ **\$90** Legal aid attorneys (*received by March 12, 2012*)

☐ **\$15** OLI Passholder (OLI Pass No. _____) and Oregon judges and their lawyer staff (*received by March 12, 2012*)

☐ **\$20** Forms on CD (*\$10 for OLI Passholders*)

☐ **\$20** Add to above tuition if registration received *after March 12, 2012*

PRODUCT ORDER

I am unable to attend. Please send me:

☐ **\$199** Audio CDs and course book

☐ **\$299** DVDs and course book

☐ **\$59** Course book only

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QUESTIONS? Call (503) 768-6580 or (800) 222-8213.

Check out our website at <http://go.lclark.edu/oli>

or e-mail us at oli@lclark.edu.

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, March 12, 2012.

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.