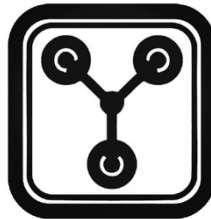


TRANSACTIONAL LAW TRILOGY

BACK TO THE FUTURE PRE-DEATH PLANNING

April 13, 2023
Estate Planning
April 20, 2023
Financial Planning
Protected Parties
Ethics



BACK TO THE FUTURE II POST-DEATH ADMINISTRATION

May 11, 2023
Probate Process
May 31, 2023
Trusts

BACK TO THE FUTURE III ADVANCED ISSUES AND TAX CONSIDERATIONS

June 15, 2023
Irrevocable Trusts
LGBTQ Estate Planning
Post Death Tax Planning
June 29, 2023
Decanting / Terminating Trusts
Valuation Discounts
LLCs in Estate Planning
Ethics



FILM CREDITS:

- ∞ Rated AB-PI for Advanced Beginner to Pre-Intermediate Audiences
- ∞ Every viewing date runs 9:00 am to 12:00 pm
- ∞ Attend live @ The Law Shop in Van Meter or view online via Zoom
- ∞ \$300 per flick (both dates) OR \$750 for full trilogy (all dates)
- ∞ Application pending for up to 17 hours CLE credit, including 2 ethics hours
- ∞ Hosted and MC'd by Halbrook Law & The Law Shop by Skogerson McGinn LLC
- ∞ Register @ <https://form.jotform.com/230665256018152>

ADDITIONAL DETAILS ON NEXT PAGE

BACK TO THE FUTURE: PRE-DEATH PLANNING

April 13, 2023

9:00 – 12:00	Estate Planning	Powers of Attorney, Wills, Trusts, Real Estate, Avoiding Probate	Matt Gardner Elissa Hodges
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April 20, 2023

9:00 – 10:00	Financial Planning Panel	Pre-Retirement, Post-Retirement, Business Valuations	Sara Velander Brian Crotty
10:00 – 11:00	Protected Parties	Care Contracts, Guardianships & Conservatorships	Cynthia Bahls
11:00 – 12:00	Ethics	Attorney Wellness Through Effective Office Systems	AJ Skogerson

BACK TO THE FUTURE II: POST-DEATH ADMINISTRATION

May 11, 2023

9:00 – 12:00	Probate Process	Document Preparation & Filing, Administration, Closing the File	Christine Halbrook
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May 31, 2023

9:00 – 12:00	*Trusts	Collaboration Between Lawyer & Trustee, Trust Types, When & Why, Trust Administration	Andrew Zimmerman
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BACK TO THE FUTURE III: ADVANCED ISSUES AND TAX CONSIDERATIONS

June 15, 2023

9:00 – 10:00	Irrevocable Trusts	When and How to Implement in Estate Plans	Christine Halbrook
10:00 – 11:00	LGBTQ Estate Planning	Identifying and Addressing Important Topics	Breanna Young
11:00 – 12:00	Post Death Tax Planning	Income, Deductions, Information Necessary for 1041s and K-1s	David Grooters

June 29, 2023

9:00 – 10:00	Decanting / Terminating Trusts	Options Available When Trusts Have Outlived Their Usefulness	Judy Johnson
10:00 – 11:00	Valuation Discounts, LLCs in Estate Planning	When and How to Use LLCs as a Tool in Estate Planning	David Repp
11:00 – 12:00	Ethics	Trust Audits, Competency, & Mental Fitness to Practice	Hope Wood

Some speakers may present from off-site locations via Zoom broadcasted from The Law Shop.
Questions? Email: amy@lawshop.net or call 515.996.4045