Basics of Estate Administration

LIVE and LIVE WEBCAST
Thursday, February 8, 2018  |  NC Bar Center, Cary

CLE CREDIT: 6.75 Hours

VIDEO REPLAYS, UPDATES & REGISTRATION
www.tinyurl.com/CLE502BEA

SUMMARY: This program covers the entire process of administration, from file organization to final distribution of assets. While an excellent training program for anyone wishing to learn estate administration, the program is a good review for more experienced attorneys and paralegals. It is planned around the newly updated North Carolina Estate Administration Manual, ninth edition which serves as the program materials.


Basics of Will and Revocable Trust Drafting

LIVE and LIVE WEBCAST
Friday, February 9, 2018  |  NC Bar Center, Cary

CLE CREDIT: 6.0 Hours

VIDEO REPLAYS, UPDATES & REGISTRATION
www.tinyurl.com/CLE503BWD

SUMMARY: In this program, experienced practitioners address the basic tax and non-tax issues involved in estate planning and the drafting of wills and revocable trusts. The program is designed primarily for attorneys, paralegals, legal assistants, trusts officers and accountants who have limited experience in this area of practice, but also serves as an excellent refresher course for more experienced attorneys.

Participants receive an overview of estate planning objectives and basic estate planning documents (including powers of attorney), an opportunity to discuss key issues relating to drafting wills and drafting and funding revocable trusts, and a summary of tax and non-tax considerations that influence drafting.

Both programs planned by the NCBA Estate Planning & Fiduciary Law Section and qualify for North Carolina State Bar Estate Planning and Probate Law Specialization credit.

The North Carolina Bar Association is accredited by the North Carolina State Bar as a provider of continuing legal education.
Thursday, February 8, 2018, 7:45a–4:30p

7:45a  Registration and Continental Breakfast (included at Live program only)

8:25  Welcome and Introductions

8:30  Pre-Qualification Procedures and Exceptions to Formal Administration
      |  Timothy W. Jones
Gathering information and other pre-qualification procedures, assets not subject to administration, small estates, summary administration, family allowances, estates composed of real estate only and transfers of motor vehicles.

9:30  Qualification and Post-Qualification Procedures
      |  Andrew L. Nesbitt
Qualification procedures for testate and intestate estates, determination of beneficiaries and other post-qualification procedures.

10:30  Break

10:45  Handling Assets
      |  Walter B. Burwell and Daniel B. Finch
Handling bank accounts, certificates of deposit, stocks, bonds, mutual funds, life insurance, government bonds, income tax refunds, real property, tangible personal property, motor vehicles, mobile homes and beneficial interests in trusts and other estates.

11:45  Handling Business Assets
      |  Holly B. Norvell
Handling sole proprietorships, partnerships, limited liability companies, C and S Corporations and professional corporations.

12:15p  Networking Lunch (included at Live program only)

1:00  Handling Retirement Accounts
      |  Charlie D. Brown
Handling employee benefit plans, individual retirement accounts and annuities.

1:45  Inventories, Accountings and Distributions
      |  Marc W. Ingersoll
Inventories, annual and final accounts, distributions and apportionment.

2:30  Break

2:45  Overview of Estate Taxation
      |  Elizabeth L. Quick
An overview of federal estate tax.

3:30  Decedent’s Tax Returns
      |  H. Chalk Broughton Jr.
Final income tax returns, estate and trust income tax returns, gift tax returns and tax returns for other states.

4:30  Adjourn

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Planners
- Charles N. “Chess” Griffin III, Kirschbaum Nanney Keenan & Griffin PA, Raleigh
- Marc W. Ingersoll, Ingersoll & Hicks PLLC, Winston-Salem

Speakers
- H. Chalk Broughton Jr., Poyner Spruill LLP, Southern Pines
- Charlie D. Brown, Law Office of Charlie D. Brown, Graham
- Walter B. Burwell, Pinna Johnston & Burwell PA, Raleigh
- Daniel B. Finch, Pinna Johnston & Burwell PA, Raleigh
- Marc W. Ingersoll, Ingersoll & Hicks PLLC, Winston-Salem
- Timothy W. Jones, Jones Branz Tarsitano LLP, Raleigh
- Andrew L. Nesbitt, Nesbitt Law PLLC, Charlotte
- Holly B. Norvell, Johnston Allison & Hord PA, Charlotte
- Elizabeth L. Quick, Womble Bond Dickinson LLP, Winston-Salem
Basics of Will and Revocable Trust Drafting

Friday, February 9, 2018, 8:25a–4:15p

8:25a  Registration and Continental Breakfast (included at Live program only)

8:55  Welcome and Introductions

9:00  Basics of Estate Planning  |  Samuel R. “BJ” Kilgore III
- Definition of estate planning
- Goals and objectives
- Significance of title
- Form or ownership and beneficiary designations
- Types of wills
- Statutory alternatives to wills
- Durable powers of attorney
- Health care powers of attorney
- Living wills
- Basic transfer tax concepts

10:30  Break

10:45  Revocable Trust Drafting  |  Jillian E. Brevorka
- Uses of revocable trusts
- Funding issues and transfer of assets to trusts
- Disposition of personal property and real property
- Integration of tax planning strategies

12:15p  Networking Lunch (included at Live program only)

1:00  Will Drafting: Non-Tax Issues  |  Janice L. Davies
- Exordium clause
- Payment of debts and other claims against the estate
- Funeral, burial or cremation instructions
- Devise of tangible personal property, real property and residuary estate
- Execution procedures

2:30  Break

2:45  Will Drafting: Tax Issues  |  John W. Forneris
- Planning for estate tax savings with marital and credit shelter trusts
- Tax implications of fiduciary selection
- Fiduciary powers

4:15  Adjourn

Planners
- Charles E. Davis III, Poyner Spruill LLP, Durham
- Lindsey N. Hills, Law Offices of Beth A. Wood PLLC, Charlotte

Speakers
- Jillian E. Brevorka, Brevorka Law Firm PC, Greensboro
- Janice L. Davies, Davies Law PLLC, Charlotte
- John W. Forneris, Robinson Bradshaw & Hinson PA, Charlotte
Hotel Information

Contact hotels directly for reservations at the special NCBA room rate. Rates are based on availability and may sell out.

- **Embassy Suites, 201 Harrison Oaks Boulevard, Cary**
  - **Nightly Rate:** $169 single/double and includes evening manager’s reception and full, cooked-to-order breakfast
  - **Reservations:** 919.677.1840 or [www.tinyurl.com/NCBA-Embassy](http://www.tinyurl.com/NCBA-Embassy)
  - **NCBA Corporate Account Special Rate Code:** 2691626
  - **Please note:** The rates may vary according to guest room availability.

- **TownePlace Suites by Marriott, 120 Sage Commons Way, Cary**
  - **Nightly Rate:** $114 studio queen with sleeper sofa (Sunday–Thursday) and includes complimentary hot breakfast. All rooms have a fully equipped kitchen.
  - **Reservations:** 919.678.0005 | Ask for the NC Bar Association corporate rate.

FINE PRINT • REGISTRATION

Registrations are limited by space, and may include a live video broadcast overflow room. TRANSFERS Registrants may transfer from a Live program, Video Replay, Webcast, Webinar or Phone/Audio Streaming Program without penalty within three business days after the program date. CANCELLATIONS Cancellations must be received by 9:00 a.m. the third business day prior to the program to qualify for a refund (less $75 administrative fee). Those not attending will receive the digital program materials in full consideration of tuition paid. MCLE CREDIT The North Carolina Bar Association is an accredited CLE sponsor under the MCLE Regulations promulgated by the NC State Bar Board of Continuing Legal Education. This program is approved (but not sponsored) by the Board for the designated number of CLE hours. Each attorney must maintain a record of his/her attendance for the NC State Bar annual report. MCLE credit is reported by NCBA only if a NC State Bar number is provided. Your CLE tuition includes mandatory State Bar fees used to support the State Bar’s Mandatory Continuing Legal Education program, the Chief Justice’s Commission on Professionalism and the Chief Justice’s Equal Access to Justice Commission. Your tuition also includes digital access to all program materials. DIGITAL PROGRAM MATERIALS You will receive a notification email when digital materials are available to download. To retrieve digital materials, log in and select “Your Course Materials” on the CLE website. All of the materials for this program will be available for download in advance of the program. VIDEO REPLAYS To qualify for the Early Bird tuition, registration must be received one week prior to program date. NC State Bar rules require a minimum number of preregistered active State Bar members. NCBA reserves the right to cancel any video program prior to the program date if registrations do not meet the NC State Bar requirement. Some sites require additional registration or evaluation forms. Visit [www.tinyurl.com/CLE502BEA](http://www.tinyurl.com/CLE502BEA) and/or [www.tinyurl.com/CLE503BWD](http://www.tinyurl.com/CLE503BWD) to confirm video replay registration and program start times. CLE credit hours at Video Replays are subject to change. Video replay program attendees may purchase the printed manuscript at cost. Due to printing and shipping lead times we are unable to accommodate requests for print materials made fewer than seven (7) days prior to any video replay program. PERSONS WITH DISABILITIES We make every effort to ensure that our programs are held in facilities which are fully accessible to persons with disabilities. If you plan to attend our program and need special facilities or assistance relating to a disability, please contact the CLE Department at least one week prior to the date of the program. INCLEMENT WEATHER We make every effort to notify registrants when a program is canceled or delayed due to weather. If inclement weather is forecast, please check your local news listings or contact event venue. NCBA programs will follow the work schedule of the hosting institutions, to include delayed openings. CLE SCHOLARSHIPS A limited number of scholarships are available to members in financial need. Contact Membership Services at 1.800.662.7407 or email akemple@ncbar.org. EVENT SPONSOR AND EXHIBITOR OPPORTUNITIES Interested in meeting the attendees of this program? Become an exhibitor or sponsor! Contact Jennifer Shapiro at [CLESponsorship@ncbar.org](mailto:CLESponsorship@ncbar.org) for detailed information about these opportunities and their benefits. FOR MORE INFORMATION, VISIT [WWW.NCBAR.ORG/CLE](http://WWW.NCBAR.ORG/CLE).

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Basics of Estate Administration — Registration
#502BEA and #502LWC | February 8, 2018

FOUR WAYS TO REGISTER
ONLINE* www.ncbar.org/CLE • PHONE* 800.228.3402 • FAX* 919.677.1774
MAIL** Attn: Accounting—NCBA, P.O. Box 3688, Cary, NC 27519-3688
*Credit cards only. **Please make checks payable to NCBA.

TUITION | LIVE • WEBCAST • VIDEO REPLAY (VR) | Select format and tuition rate below.
Important Note: The tuition for this program includes a print copy and E-version of the
North Carolina Estate Administration Manual, 9th Edition, which has been discounted
for attendees of this program only. Registrants will receive the e-version prior to the
program and a print copy will be mailed to the address provided on the registration form
within 10 days following the program.

<table>
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<th>REGISTRANT TYPE</th>
<th>REGULAR TUITION</th>
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at www.tinyurl.com/CLE502BEA to view all locations and dates, then enter your selection below.

City: ______________________ | Date: ______________________ | Code: #502 ______

REGISTRANT INFORMATION | Please print clearly.
Print Full Name: __________________________________________________________
Firm/Organization Name: __________________________________________________
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Daytime Phone Number: ___________________________________________________
Email Address: ___________________________________________________________
NC State Bar No. (Required for MCLE Credit): _________________________________

PAYMENT | Registration is processed only after payment is received. Please print clearly.
□ Enclosed is a check, payable to NCBA. □ Please charge my credit card.
Card Number: ____________________________ Expiration Date: __________
Total Amount: __________ Signature: _________________________________

See other side for the Basics of Will and Revocable Trust Drafting registration form.
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REGISTRANT TYPE | EARLY BIRD TUITION | REGULAR TUITION | WEBCAST TUITION
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NCBA Estate Planning & Fiduciary Law Section Member | $240 □ Live □ VR (see below) | $295 □ Live □ VR (see below) | $320 □ Webcast
NCBA Member | $260 □ Live □ VR (see below) | $315 □ Live □ VR (see below) | $340 □ Webcast
NCBA Paralegal Division Member | $170 □ Live □ VR (see below) | $225 □ Live □ VR (see below) | $250 □ Webcast
Non-member | $315 □ Live □ VR (see below) | $370 □ Live □ VR (see below) | $395 □ Webcast

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$170 □ Live □ VR (see below) | $195 □ Webcast
1st Year Licensed in NC (NCBA Member) $99 □ Live □ VR (see below) | $124 □ Webcast

CLE Passport Holder 6 tokens □ Live □ VR (see below) | 6 tokens □ Webcast

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Paralegal Division Student Member

Choose from the applicable Webcast tuition options above.

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City: | Date: | Code: #503

REGISTRANT INFORMATION | Please print clearly.
Print Full Name: 
Firm/Organization Name: 
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Email Address: 
NC State Bar No. (Required for MCLE Credit): 

PAYMENT | Registration is processed only after payment is received. Please print clearly.
Enclosed is a check, payable to NCBA □ Please charge my credit card.
Card Number: Expiration Date: 
Total Amount: Signature:
Managing editors: Jessica M. Hardin and Anna H. Winger

Considered the gold standard for North Carolina estate practitioners, this bestselling procedural guide continues to improve the quality of probate practice through the use of systematic and uniform procedures.

Along with the most recent legislative updates, pertinent case law, and more than 185 essential forms, this comprehensive ninth edition is enhanced with new and expanded sections on the following key topics:

- Basis consistency reporting (IRS Form 8971) (NEW)
- Uniform Adult Guardianship and Protective Proceedings Jurisdiction Act (NEW)
- Standby guardianship (Expanded)
- “Living probate” (Expanded)
- Trust administration (Expanded)

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Two great, back-to-back programs over two days at one location. Take one or take both. Earn up to 12.75 Hours of credit. Details inside this special double brochure.

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