

Building Blocks of Wills, Estates and Probate 2011

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Topics: **Basic Estate Planning** • Fees and Fee Agreements • Professional Liability to Clients and Others • Wayward Clients • Joint Representation • Marital Property • Simple Wills • Trusts • Ancillary Documents • Coordinating Non-Probate Assets • Life Insurance • Retirement • Annuities • Rights of Survivorship • Document Storage • Evaluating the Client * **Elder Law Planning and Issue Spotting** • Estate Planning for the Elderly and Disabled • Public Benefits Programs • Planning with Trusts • Veterans Benefits Basics • Recent Developments **Avoiding Claims and Ethical Issues in a Trusts and Estates Practice** * **Probate Procedures and Alternatives** • Whom Do You Represent? • Resources • Fee Arrangements • Probate and Non-Probate Assets • Probate Procedures and Will Filing • Independent and Dependent Administrations • Alternatives to Probate • Lost Will Problems • Family Settlement Agreements • Notice Requirements Before Letters are Issued • Qualification of Personal Representatives **Administration Issues** • Duties of Personal Representatives • Collection of Assets • Administration and Disposition • Filing Requirements and Deadlines • Preparing Inventories • Handling Creditor Claims • Closing the Estate • Dealing with Beneficiaries - Rights - Distribution • Disclaimers • Receipts and Releases • Funding Issues.

MCLE COURSE - 6.75 HOURS (including 3.75 ETHICS)

Applies to the College of the State Bar of Texas and the Texas Board of Legal Specialization in Estate Planning and Probate Law and Tax.

For more information, please call a DVD CLE representative at 800-204-2222, ext. 1575 or email ptrevino@texasbar.com

Building Blocks of Wills, Estates and Probate 2011

DVD CLE

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**Available beginning Feb. 26th, 2011,
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Contact Ph: (____) _____ Fax: (____) _____

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Date/s for your program (available as of Feb. 26th, 2011) _____

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