Agenda

Assisting with Estate Planning *P. Rarick*

- Identifying the goals of the estate plan: planning for retirement, planning for long term care, planning for the distribution of the estate, tax planning
- Gathering and organizing necessary information for the estate plan
  - Estate planning interviews and questionnaires
- Using standard estate planning documents to create the estate plan
  - Wills, trusts, powers or attorney and advance directives
- Implementing the estate plan
  - Executing and distributing documents, funding issues

Assisting with Guardianships and Conservatorships *C. Gill*

- Using less restrictive alternatives to guardianship: durable powers of attorney, health care powers of attorney, living trusts
- Establishing a guardianship: determination of incompetence, appointment of guardian
- Establishing the powers and duties of guardians
  - Guardian of the person, guardian of the estate
- Filing the required documents during the existence of the guardianship
- Terminating the guardianship

Assisting with the Administration of Estate Assets *C. Gill*

- Collecting assets
- Setting up the estate's checking account
- Valuing assets
- Preserving assets
- Liquidating, transferring and distributing assets

Assisting in the Probate Process *C. Gill*

- Reviewing the probate process and its alternatives
- Collecting information on the decedent, beneficiaries, assets and debts
- Preparing necessary documents to begin the probate process
  - Naming the personal representative, filing the petition, schedules and inventory
- Handling creditors' claims
  - Preparing public notices, classifying debts, disputing claims
- Closing the estate
  - Preparing the final account
  - Making distributions, obtaining releases, closing your file

Handling Ethical Issues in Estate Planning and Probate Practice *J. Williams*

- Identifying your client and avoiding conflicts of interest
- Handling issues of client competence
- Identifying and reporting abuse and/or neglect

Estate and Probate Planning Practice for Paralegals
Fort Lauderdale, FL - Friday, December 6, 2019

HalfMoon Education Inc.
PO Box 278
Altoona, WI 54720-0278

Learning Objectives

You'll be able to:

Gather necessary information for estate planning.

Work with standard estate planning documents, including wills, trusts, powers of attorney and advance directives.

Assist with the creation, administration and termination of guardianships.

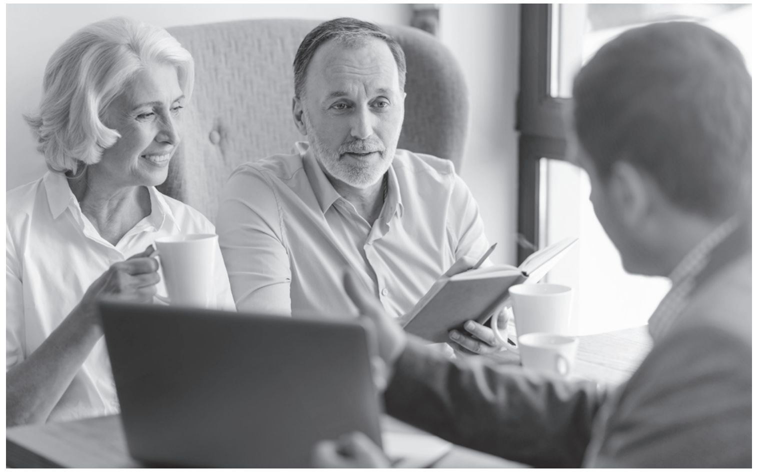
Prepare necessary documents to begin the probate process.

Value and preserve estate assets, and assist with asset transfer and distribution.

Find us on Facebook

Estate and Probate Planning Practice for Paralegals

Fort Lauderdale, FL - Friday, December 6, 2019



Learn the goals of estate planning

Collect necessary information for the estate plan

Use advance directives

Assist with guardianships

Assist with the probate process

Assist with the administration of estate assets

Review ethical issues in estate planning and probate practice

Continuing Education Credits

Florida Registered Paralegals
6.5 CLE Hours (1.0 Ethics)

NALA Certified Paralegals
6.5 CLE Hours (1.0 Ethics)

NFPA Certified Paralegals
6.5 CLE Hours (1.0 Ethics)

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Faculty

Phillip Rarick *Rarick & Beskin*

Mr. Rarick has 30 years of experience in both private and public legal work. Mr. Rarick concentrates in the fields of estate planning (wills and trusts), asset protection, probate, and business law. Integrated asset protection with an estate plan designed to protect wealth and secure tax advantages are a primary focus of his practice. He is an active member of the Elder Law Section of The Florida Bar, and the Real Property, Probate and Trust Law section of The Florida Bar. Mr. Rarick is the primary writer and editor for the Florida Trust & Probate Attorneys Blog.

Christine C. Gill *Christine C. Gill, P.A.*

Ms. Gill has been practicing law in Florida for 26 years. She received her B.A. degree from Southern Methodist University in 1989, her law degree from Cumberland School of Law in 1992, and her LL.M. in Taxation from Univeristy of San Diego in 1993. Ms. Gill has worked in the trust department of SunTrust Bank, and worked for a professional guardian before entering private practice. She has been in private practice since 1999. While most of her law practice is situated in Broward, Palm Beach, and Miami-Dade Counties, she has practiced in many other counties in Florida. Ms. Gill is married to Sean, and has two daughters, Mary Elizabeth and Megan.

Jorja Williams, Esq. *Beller Smith*

Ms. Williams, Esq., is a senior associate with the law firm of Beller Smith, P.L. located in Boca Raton. She concentrates her practice in the areas of estate and trust litigation, administration and planning. Ms. Williams represents beneficiaries, trustees, personal representatives and other interested parties in will and trust contests. She assists clients in the administration of complex estates and trusts and also represents charitable organizations in seeking and maintaining their tax-exempt status.

Seminar Information

Courtyard Fort Lauderdale North/Cypress Creek
2440 West Cypress Creek Road
Fort Lauderdale, FL 33309
(954) 772-7770

Registration
8:00 - 8:30 am
Morning Session
8:30 am - 12:15 pm
Lunch (on your own)
12:15 - 1:15 pm
Afternoon Session
1:15 - 4:30 pm

Tuition

$289 for individual registration
$269 for three or more registrations.

Included with your registration: *Complimentary continental breakfast and printed seminar manual.*

Receive a reduced tuition rate of $101 by registering to be our on-site coordinator for the day. For availability and job description, please visit *www.halfmoonseminars.org*.

How to Register

- Visit us online at www.halfmoonseminars.org
- Mail-in or fax the attached form to 715-835-6066
- Call customer service at 715-835-5900

Cancellations: Cancel at least 48 hours before the start of the seminar, and receive a full tuition refund, minus a $39 service charge for each registrant. Cancellations within 48 hours will receive a credit toward another seminar or the self-study package. You may also send another person to take your place.

Continuing Education Credit Information

This seminar is open to the public and offers 6.5 CLE hours, including 1.0 ethics hour, to paralegals. Certification is not required to attend this event.

The National Federation of Paralegal Associations has approved this course for 6.5 CLE hours, including 1.0 ethics hour, for certified paralegals. The NFPA approval qualifies this course for Florida paralegals.

The National Association of Legal Assistants has approved this course for 6.5 CLE hours, including 1.0 ethics hour, for certified paralegals.

Attendance will be monitored, and attendance certificates will be available after the seminar for most individuals who complete the entire event. Attendance certificates not available at the seminar will be mailed to participants within fifteen business days.

Additional Learning

The Complete Trust Course

Presented by: Phillip Rarick, Robin King and Jorja Williams, Esq.

Fort Lauderdale, FL
Wednesday, October 30, 2019

Understanding Estate, Gift, Income and Trust Taxation

The Critical Role of Testamentary Trusts in the Estate Plan

Irrevocable Trusts and the Basics

Income and Generation-Skipping Transfer Tax Basics

Using Revocable Trusts

IRAs and Trusts: Sophisticated Beneficiary Choices

Asset Protection Planning for Seniors and the Disabled

Advanced Trust Planning

For more information visit:
www.halfmoonseminars.org/webinars/

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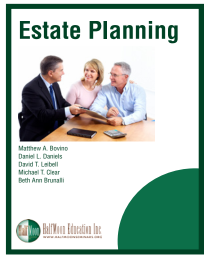
Estate Planning Manual

Included with each registration and written for HalfMoon Education Inc. by Matthew A. Bovino, Daniel L. Daniels, David T. Leibell, Michael T. Clear, and Beth Ann Brunalli.

In this comprehensive, 200+ page manual you'll learn about federal tax law, estate planning, retirement asset planning, asset protection planning, charitable planning, and much more.



Can't Attend? Order the Manual and Audio from the Live Seminar as a Self-Study Package!
Audio recordings of this seminar are available for purchase starting at $269. See registration panel for more information and please refer to specific state licensing rules or certification requirements to determine if this learning method is eligible for continuing education credit.

Registration

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How to Register

Online:
www.halfmoonseminars.org

Phone:
715-835-5900

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54720-0278

Complete the entire form. Attach duplicates if necessary.

Registrant Information

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Additional Registrants:

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Occupation:
Email:
Phone:

Name:
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Email address is required for credit card receipt, program changes, and notification of upcoming seminars and products. Your email will not be sold or transferred.

( ) I need special accommodations. Please contact me.

Tuition

( ) **I will be attending the live seminar.** Single Registrant - **$289.00**. Three or more registrants from the same company registering at the same time - **$269.00** each.

( ) **I am not attending.** Please send me the self-study package:

☐ Downloadable MP3 Audio/PDF Manual for **$269.00**.

☐ CD/Manual Package for **$289.00**. ☐ USB/Manual Package **$289.00.**

(S&H included. Please allow five weeks from seminar date for delivery)

Checks: Make payable to HalfMoon Education Inc.

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