

Agenda

Creating Revocable “Living” Trusts Purposes of the revocable trust Benefits and drawbacks Funding the trust Administrative issues	<i>B. Johnson</i>
Creating Irrevocable “Living” Trusts Purposes of the irrevocable trust Benefits and drawbacks Funding the trust Administrative issues	<i>B. Edwards</i>
Using Special Needs Trusts to Help Your Client Able accounts 1st party special needs trusts 3rd party special needs trusts	<i>C. Morgan</i>
Understanding the Grantor’s Goals and Potential Risks Long-term and short-term financial goals Identifying beneficiaries Identifying assets and potential risks Objectives for asset management and control Creation, duration, and termination of trust	<i>S. Nickle</i>
Asset Protection Planning for Seniors and the Disabled Overview of government benefit programs Trust options Planning for spouses, supplemental needs trusts	<i>R. Lish</i>

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All About Trusts in Utah

Live, Interactive Webinar - Wednesday, May 29, 2024

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Learning Objectives

- You’ll be able to:**
- Explore** the benefits and drawbacks of revocable “living” trusts.
 - Create** and fund irrevocable “living” trusts.
 - Use** special needs trusts to assist your clients.
 - Create** trusts with an understanding of the grantor’s goals, the beneficiaries’ needs, and management and control objectives.
 - Realize** the asset protection benefits of trusts for seniors and the disabled.



HalfMoon Education Inc.,
Your LIVE Education Leader Presents

All About Trusts in Utah

Live, Interactive Webinar - Wednesday, May 29, 2024



- Get tips on** creating revocable “living” trusts
- Understand** the grantor’s goals and potential risks
- Learn** the benefits and drawbacks of irrevocable “living” trusts
- Discuss** the asset protection purposes of trusts
- Use** special needs trusts to help your clients

Continuing Education Credits

Accountants 8.4 CPE Credits	Attorneys Pending
NASBA 8.4 CPE Credits	



Webinar Information

Online - Wednesday, May 29, 2024

Log into Webinar 8:00 - 8:30 am MDT	Break 12:45 - 1:15 pm MDT
Morning Session 8:30 am - 12:45 pm MDT	Afternoon Session 1:15 - 4:30 pm MDT

Tuition
\$339 for individual registration.
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Faculty

Blake B. Johnson, Esq is the managing partner of Trusted Estate Planning Attorneys, a multi-state estate planning law firm that helps clients ensure their assets are not wasted upon their passing. Mr. Johnson is also a second-generation estate planning attorney who has seen first-hand how good planning can lead to extraordinary results, especially in the charitable planning world. Mr. Johnson attended BYU for his undergraduate degree in Business Management and Finance, and law school at the Paul M. Hebert Law School at LSU. Outside of work, Mr. Johnson has served the Boy Scouts of America as Assistant Scout Master, and he served on the Las Vegas Chapter of the BYU Management Society Board. He has been a local church youth leader and was a member of the Rotary Club in Las Vegas.

Blaine Edwards proudly served six years in the United States Navy as a nuclear engineering technician onboard nuclear-powered submarines. Mr. Edwards gained a love for technology and computer programming, which he continues today. He is an avid programmer and is a big advocate of the maker movement. Because of his love for technology, Mr. Edwards has gravitated towards technology law and intellectual property. He has served large corporations on the use of intellectual property and how to best protect it. Mr. Edwards also has great passion for the future of technology and the latest developments, such as blockchain technology.

Chris Morgan graduated from Arizona State University's Sandra Day O'Connor College of Law in 2014. Previously he studied History at Brigham Young University. While in law school, he was recognized as a finalist in a national legal writing competition with an essay on using estate planning to prevent elder abuse. Mr. Morgan practices exclusively in the area of estate planning and probate. He has a particular interest in protecting children and adults with special needs or disabilities with specialized estate planning and trusts. Mr. Morgan is a member of both the Elder Law and Estate Planning Sections of the Utah State Bar and serves on the Legislative Committee for those sections. He absolutely loves his job and the clients he is privileged to serve. Finally, getting to what matters most, Mr. Morgan is married to the love of his life and has a son who is everything to him.

Credit Information

This webinar is open to the public and offers accountants 8.4 CPE credits (based on 50-minute hours) of intermediate-level group internet based CPE credits in the area of finance. Knowledge of trusts is beneficial, and no advance preparation is recommended. NASBA Sponsor No. 103015.

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HalfMoon Education will provide financial hardship assistance to accountants who wish to attend this event. Contact Frank Chapman at fchapman@halfmoonseminars.org for details and to apply.

Scott P. Nickle originally interned with Helgesen, Houtz & Jones in 2005, during the summer after his second year of law school, and he has been with HH&J since graduating from Gonzaga University School of Law in 2006. Mr. Nickle is a native of Salt Lake City. He is a 1995 graduate of Weber State University. Mr. Nickle attended California State University, Fullerton, where he received his Master of Arts Degree in 1998 and stayed on to teach beginning college writing in the English Department. Mr. Nickle returned to Utah and taught composition at Weber State University until he decided to go back to school and attended Gonzaga University School of Law in 2003. Mr. Nickle specializes in family law issues, from infant and adult adoptions to surrogacy and estate planning for any family of any income. Much of his experience in this area of practice focuses on divorce, both stipulated and litigated. In this capacity, Mr. Nickle takes seriously the role of counselor—helping divorcing parties come to a quick and final resolution, which he believes is best for all those concerned. However, when litigation becomes appropriate, he employs an aggressive collaboration-oriented approach combined with the experience necessary to bring about a successful conclusion. Mr. Nickle has also served as legal counsel for hundreds of criminal defendants, both in juvenile and adult courts, and enjoys and understands the importance of this opportunity to serve clients throughout this difficult process.

Randy M. Lish has been helping people plan and administer their estates since 1982. And in that time, he witnessed how intentional planning can do wonderful things for families and individuals. His practice focuses on estate planning, specializing in Medicaid planning, special needs planning, asset protection planning, probate, and elder law. When clients come to him for help, he makes it a priority to learn about their family circumstances. He aims is to put together a plan that will set their legacy families on the path toward success. Mr. Lish is admitted to the Utah Bar and went to Brigham Young University. He formally was a partner at McCullough, Jones & Ivins.

This webinar has been submitted to the Utah State Board of Continuing Legal Education for CLE accreditation, which is currently pending. Please visit this course listing at www.halfmoonseminars.org for updates on pending credits.

Attendance will be monitored, and attendance certificates will be available after the webinar for those who attend the entire course and score a minimum 80% on the quiz that follows the course (multiple attempts allowed).

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