

Credit Information

All About Trusts in Colorado

This webinar is open to the public and is designed to qualify for 7.2 CPE credits for accountants, 7.0 CLE credits for attorneys and 7.0 CE credit for financial planners in Colorado.

This webinar is open to the public and offers accountants 7.2 CPE credit hours (based on 50-minute hours) of intermediate-level group internet based CPE credits in the area of Specialized Knowledge. Knowledge of trusts and estate planning is beneficial, and no advance preparation is recommended. NASBA Sponsor No. 103015.

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Colorado Elder Law and Planning Update

This webinar is open to the public and offers accountants 7.2 CPE credits (based on 50-minute hours). This course is an intermediate-level, group internet based activity in the area of specialized knowledge. Knowledge of elder law and issues 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.

This webinar has been approved by the Colorado Supreme Court for 7.0 general CLE credits and 1.2 ethics CLE credits. Colorado attorneys and judges are individually responsible for reporting credits directly to their online transcript.

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All About Trusts in Colorado

- Wednesday, September 11, 2024 | 8:30 am - 3:30 pm MDT

Colorado Elder Law and Planning Update

- Wednesday, September 25, 2024 | 8:30 am - 3:30 pm MDT



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Tuition: \$339 per registrant
\$309 per attendee for group registrations of two or more from the same company, at the same time, for the same program

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Agenda:

Understanding the Grantor’s Goals and Potential Risk *M. Anderson*

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

Creating Revocable “Living” Trusts *D. Metzner*

Purposes of the revocable trust Benefits and drawbacks
Funding the trust Administrative issues

Overview of Gift, Estate and GST Tax *A. Burton*

Post-Death Tax Planning *A. Kirven*

Transfer taxes recap Key tax terms
Considerations for choosing estate plan
• Tax considerations • Non-Tax considerations
Trusts as tax planning tools
Common strategies to recommend to married couples
Common strategies for single persons or on death of surviving spouse
Trust administration issues

Trust Administration *N. Bjorklund*

Initial trust administration steps
Beneficiary notices and rights
Administering revocable trusts after the settlor’s death
Administering intervivos irrevocable trusts
Administering a directed trust
Special issues in administration
Tax issues

Presented by

Melissa Dougherty Anderson is a Colorado native and the owner of her private law practice www.coloradoestateplanner.com. She specializes in Trust and Estate Planning, Probate Administration, and Business Law

Dylan Metzner is a Shareholder with Buchalter. He is a member of the Tax, Benefits and Estate Planning practice group.

Aaron Burton is an attorney with Robinson, Waters & O’Dorisio, P.C. He focuses his practice on business, tax, and estate planning.

Alex Kirven is Special Counsel with GEM Family Law. He practiced as an associate attorney for four years in the tax and estate planning group at Sherman & Howard.

Nick Bjorklund is the Founder and Managing Attorney of Birch Grove Legal PLLC, a legacy planning and administration law firm located in Denver and Castle Rock.

Please see course listing online to read full presenter biographies.

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Colorado Elder Law and Planning Update

Wednesday, September 25, 2024 | 8:30 am - 3:30 pm MDT

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Presented by Lisa T.C. Blattner, Jack Roth, and Catherine Anne Seal

Learning Objectives:

Discuss strategies for addressing the specific needs of aging clients.
Prevent conflicts of interest and recognize the signs of elder abuse and neglect.
Explore the processes for obtaining guardians and court-appointed counsel.
Get tips on using common estate planning techniques, including wills, trusts and powers-of-attorney.
Explore Medicare and Medicaid.
Get tips on recovering a decedent’s assets for the benefit of creditors and beneficiaries.

Agenda:

Introduction to Elder Law

What is elder law? Relevant law both to Federal and State
Elder law is about seniors (but can also involve disability and minors)
Elder law is a growth field Issues of aging clients
Specialization Finding an elder law attorney
Access to justice: problems your clients face at home, in your office, and in court

Handling Ethical Issues in Representation of the Elderly

Identifying the client Advising fiduciaries
Preventing conflict of interest Determining capacity
Maintaining client confidentiality
Professional referrals – know your experts (evaluators)
Red flags re: elder abuse and neglect

Overview of Guardianships and Conservatorships

Defining
Interested persons and court appointments (GAL, CAC, court visitor)
Court process
Roles in court appointment: court visitor, attorney, GAL
After court appointment of guardian/conservator
Other considerations: elderly, minors, mental health

Estate Planning for the Elderly or Disabled Client

Will vs. revocable trust Powers of attorney
Alternatives to powers of attorney: medical proxy, supportive decision-making
Living wills First and third-party special needs trusts
Planning for unmarried couples

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Financial Planning for the Elderly and Disabled: Asset Protections – What it Is and What It Isn’t

Medicare vs. Medicaid
Asset protection estate planning considerations

Decedent’s Assets: Where Did They Go, Can They Be Clawed Back, and Strategies for Recovering Assets for Aggrieved Creditors and Beneficiaries

Rights of creditors, beneficiaries, personal representative to “claw back” certain assets into a decedent’s estate when they were transferred by the decedent prior to death, with or without fraud
Terms of divorce never finalized prior to death
Retirement assets Life insurance assets
Elder law resources

Presented by

Lisa T. C. Blattner is an attorney in private practice. She represents clients in all different capacities, assists with the Courts as a *Guardian ad Litem*, and collaborates with fellow counsel.

Jack Roth is the Managing Partner of the Probate & Estate Planning Division of Gasper Law Group, joining after twenty years as a prosecutor.

Catherine Anne Seal is of counsel at Gasper Law Group in Colorado Springs and is the Public Administrator for the Fourth Judicial District of Colorado, serving El Paso and Teller Counties

Please see course listing online to read full presenter biographies.

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