

Symposium 2
Saturday, February 2, 2019

8:30 a.m. Funding Your Trust	8:30 a.m. Income Taxes for Trusts
Break	
9:45 a.m. Trustee Training: <i>The Trust Process</i>	9:45 a.m. Cyber Threats & Fraud
Break	
11:00 a.m. Trustee Training: <i>Administration Process</i>	11:00 a.m. Gun Trusts & Firearms Planning

Symposium 3
Saturday, May 4, 2019

8:30 a.m. Trustee Training: <i>The Trust Process</i>	8:30 a.m. Current Events in Estate Planning
Break	
9:45 a.m. Trustee Training: <i>Administration Process</i>	9:45 a.m. The Truth About Organ, Tissue, and Eye Donation
Break	
11:00 a.m. Have You Done Your Homework?	11:00 a.m. Leaving a Legacy

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Annual Educational Symposiums



September 29, 2018
February 2, 2019
May 4, 2019

Wilson Law Group, LLC
Your Life. Your Legacy. Your Way.™



All classes are offered exclusively as a courtesy to our RWay members and their guests. Seating is limited, please make your reservation as early as possible.

Where:
Clarion Suites
2110 Rimrock Road
Madison, WI 53713

RSVP EARLY!

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 608-833-4001

Email: mail@wilsonlawgroup.com

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(Seminars; For Clients Only; Register)

Symposium 1
Saturday, September 29, 2018

8:30 a.m. Trustee Training: <i>The Trust Process</i>	8:30 a.m. Options for
Break	Continuity of
9:45 a.m. Trustee Training: <i>Administration Process</i>	Long-Term Care and Panel Discussion
Break	
11:00 a.m. LegalVault	11:00 a.m. How to Protect Your Assets from Nursing Home Costs

These three core workshops are recommended to first-time attendees and their Trustees.

Trustee Training *The Trust Process*

The program will provide attendees with an understanding of estate planning concepts, why a trust is useful in family planning, and an introduction to the trust administration process. Attendance is a must for every trustee of every trust. A workbook will be included. We encourage you and your successor trustees to attend this workshop. This program is a precursor for the Trustee Training (*The Administration Process*) program.

Trustee Training *The Administrative Process*

This program was designed for successor trustees. Prior attendance at the Trustee Training (*The Trust Process*) program is highly encouraged. The Trust Administration workshop provides trustees with a detailed description of the decisions to be made and the tasks to be completed following the death of a trust maker. These include valuing assets, administering retirement plans and annuities, dividing and distributing trust assets, and preparing estate and fiduciary income tax returns. It is important to know how to handle these responsibilities before the need exists.

LegalVault

This workshop is for anyone who would like to learn more about the benefits and functions of their LegalVault account. LegalVault enables you to keep, track, and review your documents outside of your regular estate planning meetings, control access to your estate planning documents, and add additional documents to your vault that requires privacy. LegalVault also allows physicians and hospitals to have access to your medical directives at a moment's notice.

Options for Continuity of Long-Term Care and Panel *Presented by Industry Experts*

When the ability to care for yourself, a family member, or a friend comes into question, you need to know what options are available. Our expert panel, in a two-hour program, will explore the different characteristics, benefits and many options available.

How to Protect Your Assets from Nursing Home Costs

The cost of long-term care is very high and increases every year, which leads to many people exhausting their entire life savings paying for it. What strategies are available to proactively and reactively plan for protecting assets from the nursing home for those who cannot qualify for long-term care insurance? This program will review the planning techniques that can solve this problem.

Funding Your Trust

Funding is a critical function of maintaining your trust. Even though your current assets are in your trust, it is your responsibility to make sure that all assets acquired in the future are also in your trust. We are here to help you learn what to do and when to do it. This workshop will help you understand how to properly maintain your trust. This class provides essential information to correctly fund your trust, so be sure to sign up if you haven't yet taken the class.

Income Taxes for Trusts

Income Taxes are often a secondary discussion topic during the course of planning an estate. However, basic knowledge of trust and estate income tax rules is essential to avoiding common mistakes that can cost thousands of dollars. This program will provide a practical overview of the issues that arise in connection with the income taxation of trusts and estates.

Cyber Threats and Fraud *Presented by Stephen Frew*

Cyber threats have changed how individuals and businesses are attacked. These attacks, and the expert criminals that launch them, are more patient and resilient than ever before. This program will help you assess cyber risks and take the necessary steps to protect yourself.

Current Events in Estate Planning

As we know estate planning is essential to make sure your assets and values pass on to future generations in the way that we want. Every year, changes in tax laws and other related provisions can affect your estate plans. We will look at the most important changes that can have an impact in your plan.

Leaving a Legacy *Presented by Anita Hecht*

We often pay more attention to passing on our possessions than we do to passing on our life stories. Consider however, that one of the greatest gifts you can give your current and future loved ones is the story of your life.

Anita Hecht, founder of Life History Services, professional interviewer for Steven Spielberg's Shoah Foundation, as well as numerous oral history projects will lead us in exploring the value and process of capturing and preserving one of your most important legacies.

The Truth About Organ, Tissue, and Eye Donation

Making a decision about donation comes, for many families, at a time of great stress, anxiety, and sadness. By understanding the facts about donation, you can educate and prepare your family about your decision to become a donor, and they will find peace knowing they've carried out your wishes.

Gun and Firearms Planning

If you are a gun owner, have you thought about how to fully enjoy your firearms during your lifetime and transfer firearms to your loved ones upon your death? Attend this seminar to learn about ways to hold legal title to your firearms; protect yourself from liability; and reduce or eliminate government fees and interference in your collection.

Have You Done Your Homework?

This is a great follow-up program to our "Pre-Planning Your Funeral" workshop. We have partnered with you to create a customized trust specifically for your needs. However, your trust binder is full of important documents that only you can spring to life. This workshop offers a guided session to completing your Memorandum for Distribution, Remembrance and Services Memorandum, Child Care Exhibit, Key Information section, and other documents that you should customize. Please bring your trust binders and we will review your homework or assist you in completing it.