Symposium 2
Saturday, February 2, 2020

8:30 a.m. The Future of IRA Planning	**8:30 a.m.** How to Pay for the Cost of Long Term Care
Break	
9:45 a.m. Trustee Training: *Trust Process*	**9:45 a.m.** Using Trusts to Protect Your Assets from Long Term Care Costs
Break	
11:00 a.m. Trustee Training: *Administration Process*	**11:00 a.m.** Pre-Planning Your Funeral

Symposium 3,
Saturday, May 4, 2020

8:30 a.m. Trustee Training: *Trust Process*	**8:30 a.m.** Current Events
Break	
9:45 a.m. Trustee Training: *Administration Process*	**9:45 a.m.** Have You Done Your Homework?
Break	
11:00 a.m. Funding Your Trust	**11:00 a.m.** The Truth about Organ, Tissue, and Eye Donation

7633 Ganser Way, Suite 100
Madison, Wisconsin 53719
(608) 833-4001
wilsonlawgroup.com

Annual Educational Symposiums

RWay

Save These Dates

October 19, 2019
February 8, 2020
May 2, 2020

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

When:
Saturday, October 19, 2019
Saturday, February 8, 2020
Saturday, May 2, 2020

Three Ways to Register:

Phone
608-833-4001

Email

mail@wilsonlawgroup.com

Website

wilsonlawgroup.com

All classes are presented by WLG unless otherwise indicated

Symposium 1
Saturday, October 19, 2019

8:30 a.m. Trustee Training: *Trust Process*	**8:30 a.m.** Travel Today: Tips & Safety
Break	
9:45 a.m. Trustee Training: *Administration Process*	**9:45 a.m.** Cyber Threats & Fraud
Break	
11:00 a.m. LegalVault	**11:00 a.m.** Income Taxes for Trust

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

Trustee Training
The Trust Process

This program will provide attendees with an understanding of estate planning concepts, why a trust is useful in comprehensive 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

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 Trustmaker. 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. Prior attendance at the Trustee Training (The Trust Process) program is highly encouraged.

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 healthcare providers to have access to your medical directives at a moment's notice.

Travel Today: Tips and Safety
Presented by Clara Christianson

An expert in the field of travel will share with you key tips on how to plan for and enjoy a safe trip. Topics to be covered include: history of traveling and what has changed, tips for traveling, preparing to fly, special considerations when traveling abroad, most common travel mistakes, top 10 reasons to work with a travel agent, what to keep in mind when using an online travel service, and packing/luggage considerations.

Cyber Threats and Fraud
Presented by an Industry Expert

Individuals and businesses continue to face the danger of fraud and monetary loss on the internet. 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.

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.

Funding Your Trust

Funding is a critical function of maintaining your trust. Even though your current assets are coordinated with your trust, it is your responsibility to make sure that all assets acquired in the future are also coordinated with your trust. This workshop will help you understand how to properly maintain your trust funding. It also provides essential information to correctly fund your trust, so be sure to sign up if you have not yet taken the class.

Using Trusts to Protect Your Assets from Long Term Care Costs

Using an Irrevocable Trust may protect your assets from the costs of Long Term Care for those who cannot qualify for other planning alternatives. This program will review the pros and cons of Irrevocable Trusts in Long Term Care planning.

How to Pay for the Cost of Long Term Care
Presented by Industry Experts

Long Term Care is increasingly expensive, leading many to exhaust their entire life savings paying for it. Long Term Care insurance and other strategies can provide crucial funds to pay for services and proactively plan for nursing home care. Our panel will review the pros and cons of various alternatives of paying for the costs of Long Term Care.

Current Events in Estate Planning

As we all know, estate planning is essential to making sure your assets and values pass on to future generations in the way that you want. This program is designed to keep you up to date with how changing laws and court decisions can impact your existing planning. We will discuss the most important changes that can have an impact in your plan.

Have You Done Your Homework?

Not only is your trust binder full of important legal documents, but it also contains documents to guide your family in implementing your plan. This workshop offers a guided session to completing your Memorandum for Distribution of Personal Property, Remembrance and Services Memorandum, Child Care Exhibit, Key Information section, and other documents that you may customize. Please bring your trust binder(s) and we will identify your "homework" and provide direction on completing it.

Pre-Planning Your Funeral
Presented by Ric Vanderhoef

Controlling the cost of your funeral is an important aspect of your estate plan. In this program, we will explore options for prepaying funeral and burial costs, requirements for cremation, and other matters every person should consider when making funeral arrangements. Making these important decisions in advance will provide peace of mind for both you and your family.

The Future of IRA Planning

If you are a person or couple with retirement accounts (IRAs, 401K, 403(b), etc.) of $100,000 or more, you should be aware of the new congressional proposals regarding restrictions on inherited IRAs. The stretch IRA is one of the most valuable planning tools for your children and grandchildren by turning modest IRAs into multi-million dollar assets for heirs. If you want your IRA to not only benefit you, but also help provide for your children while maintaining complete asset protection for the IRA, you will want to attend this program. We will bring you up to date with proposed changes to these laws.

The Truth About Organ, Tissue, and Eye Donation
Presented by Donate Life Wisconsin

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 have carried out your wishes.