

**Symposium 2**  
**Saturday, January 23, 2021**

<b>8:30 a.m.</b> LegalVault	<b>8:30 a.m.</b> Income Taxes for Trusts
Break	
<b>9:45 a.m.</b> Trustee Training: <i>Trust Process</i>	<b>9:45 a.m.</b> Protecting Your Identity & Your Credit
Break	
<b>11:00 a.m.</b> Trustee Training: <i>Administration Process</i>	<b>11:00 a.m.</b> Travel Today: Tips & Safety



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**Symposium 3**  
**Saturday, May 15, 2021**

<b>8:30 a.m.</b> Trustee Training: <i>Trust Process</i>	<b>8:30 a.m.</b> Current Events in Estate Planning
Break	
<b>9:45 a.m.</b> Trustee Training: <i>Administration Process</i>	<b>9:45 a.m.</b> Your Vacation Home
Break	
<b>11:00 a.m.</b> Have You Done Your Homework?	<b>11:00 a.m.</b> Leaving a Legacy

# Annual Educational Symposia



**Save These Dates!**

September 26, 2020  
 January 23, 2021  
 May 15, 2021

Follow us!



 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 reservations as early as possible.*

**Where:**

Clarion Suites  
 2110 Rimrock Road  
 Madison, WI 53713

**When:**

Saturday, September 26, 2020  
 Saturday, January 23, 2021  
 Saturday, May 15, 2021

**Three Ways to Register:**

**Phone**  
 608-833-4001

**Email**  
 mail@wilsonlawgroup.com

**Website**  
[wilsonlawgroup.com](http://wilsonlawgroup.com)

\*All classes are presented by WLG unless otherwise indicated\*

**Symposium 1**  
**Saturday, September 26, 2020**

<b>8:30 a.m.</b> Trustee Training: <i>Trust Process</i>	<b>8:30 a.m.</b> Using Trusts to Protect Your Assets from Long-Term Care Costs
Break	
<b>9:45 a.m.</b> Trustee Training: <i>Administration Process</i>	<b>9:45 a.m.</b> Beyond Your Legal Documents
Break	
<b>11:00 a.m.</b> Funding Your Trust	<b>11:00 a.m.</b> Focus on Health & Wellness

*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 and successor Trustee. A Trustee Handbook will be included. 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.

### **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**

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. 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.

### **Focus on Health & Wellness Presented by Eric Foxman**

Wellness is more than avoiding sickness and injury. It is a process of self-awareness, conscious change, and making thoughtful decisions to improve oneself. This course will examine how proven, science-based methods like exercise and smart food choices can ensure you live a healthy and fulfilling life...and have fun while doing it!

### **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.

### **Beyond Your Legal Documents**

After you sign your trust documents and even after you have done your "homework," there are many things you can do to make sure your planning works as smoothly as possible. This program will dive deep into best practices for health care documents, what information should be shared with beneficiaries and successor Trustees, ways to organize certain information, and why the documents need a plan for implementation before something happens in your life.

### **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 workshop will provide a practical overview of the issues that arise in connection with the income taxation of trusts and estates.

### **Protecting Your Identity & Your Credit Presented by an Industry Expert**

Identity theft is on the rise, and it has become a very real issue for Americans. Even large corporations like Target and Sony have had massive data breaches. How can you protect yourself? This workshop will review methods to help you safeguard your information against identity theft, as well as help you defend yourself in the event that your information is compromised.

### **Your Vacation Home**

Whether it's a small cabin "up north" or a Florida winter getaway, a vacation home can be a wonderful place for families to gather and create memories. Unfortunately, property or items that create the most joyful memories in life often become painful points of friction without proper planning. Topics we will cover include title issues, renting, gifting, location, and divorce.

### **Travel Today: Tips & Safety Presented by Clara Christianson**

An expert in the field of travel will share 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; packing/luggage considerations; and concerns regarding COVID-19.

### **Have You Done Your Homework?**

Not only is your trust binder full of important legal documents, 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.

### **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 and 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 your most important legacy.