

Presented by:



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Idaho State Bar



Estate Planning Basics CLE

May 18, 2015

The Law Center - 525 W. Jefferson Street - Boise, ID

Approved for 3.5 CLE credits of which 0.5 is Ethics

Agenda

(All times in Mountain Time Zone)

8:00 a.m. **Registration & Continental Breakfast**

8:25 a.m. **Welcome/Opening Remarks**
Kimmer W. Callahan
Callahan & Associates, Chtd.

8:30 a.m. **Client Interview Process**
Brian L. McMahan
Evans Keane LLP

9:15 a.m. **Will vs. Trust and Standard Will Provisions**
Sandra L. Clapp
Sandra L. Clapp & Associates, P.A.

10:00 a.m. **Break**

10:10 a.m. **The Default Plan (Intestate Succession)**
Brian L. McMahan

10:55 a.m. **Incapacity Issues & Supporting Documents - DPA & Health Care Directive**
Sandra L. Clapp

11:20 a.m. **Planning for Minor Children**
Kimmer W. Callahan

11:40 a.m. **Ethics**
Sandra L. Clapp

12:10 p.m. **Program Concludes**

Registration Fee:

- Taxation, Probate & Trust Law Section or Young Lawyer Section Members.....\$90.00
- Non-Section Members.....\$115.00
- Law Students/Non-Lawyers.....\$35.00

Registration Information

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