

# ODDITIES AND CHALLENGES IN PROBATE LAW

Skillfully Handle Challenges  
Associated with Probate

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DES MOINES, IA  
JUNE 29, 2009

CEDAR RAPIDS, IA  
JUNE 30, 2009

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## Credit Information

Financial Planners - 7.0

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*See inside for details.*

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## one-day live seminar

### Faculty

Ross F. Barnett  
*Abendroth and Russell, P.C.*

Bruce L. Butler  
*Butler Law Office*

Jason M. Steffens  
*Simmons Perrine Moyer Bergman PLC*

Kyle W. Wilcox  
*Simmons Perrine Moyer Bergman PLC*

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# SEMINAR OUTLINE

## **I. TACKLE PERSONAL REPRESENTATIVE CHALLENGES GRACEFULLY**

*9:00 - 10:00, Written by Ross F. Barnett.*

*Presented by Ross F. Barnett in Des Moines and Kyle W. Wilcox in Cedar Rapids.*

- A. Pitfalls in Appointment and Authority of a Personal Representative
- B. Problems the Removal of a Personal Representative Can Trigger
- C. Your First Step After a Personal Representative Resigns
- D. Minimize the Adverse Effects of Disability or Death of a Personal Representative
- E. Handle the Logistics of Dealing With Out of State Personal Representatives
- F. How to Control the Wayward Personal Representative

## **II. DISTRIBUTION OF PERSONAL PROPERTY**

*10:15 - 11:15, Written by Ross F. Barnett.*

*Presented by Ross F. Barnett in Des Moines and Kyle W. Wilcox in Cedar Rapids.*

## **III. AVOIDING PROBATE AFTER THE FACT**

*11:15 - 12:30, Written and presented by Bruce L. Butler in Des Moines and Cedar Rapids.*

## **IV. FIDUCIARY RETURN ISSUES**

*1:30 - 3:15, Written and presented by Bruce L. Butler in Des Moines and Cedar Rapids.*

## **V. PROBATE LITIGATION**

*3:30 - 4:30, Written by Jason M. Steffens.*

*Presented by Bruce L. Butler in Des Moines and Jason M. Steffens in Cedar Rapids.*

- A. Probate Discovery
- B. What Not to Do in Probate Litigation
- C. Probate Litigation Issues
  1. Will Contests
  2. Multiple Wills
  3. Court Interpretation of Will Provisions
  4. Creditor Claims
  5. Disputes Between Beneficiaries and Personal Representatives
- D. Appeals Process Detailed

*\*If needed, the above agenda may be changed to best accommodate all of our attendees.*

## WHO SHOULD ATTEND

This **intermediate level program** is designed for the following who want to learn how to solve unusual challenges that occur during probate:

- Attorneys
- Paralegals
- Accountants
- Trust officers

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# SEMINAR OVERVIEW

## ABOUT THIS SEMINAR

### Never Again Be Caught Off Guard by the Unexpected in Your Probate Practice

This one-day seminar will provide insights and solutions for specialized probate situations you may not deal with every day. Learn how to determine the best course of action when confronted with unusual challenges so you can carry out your client's wishes. Our faculty will share situations they've encountered, and prepare you to troubleshoot effectively.

*Join us today!*

## 6 BENEFITS OF ATTENDING

- Neutralize negative challenges involving personal representatives – including resignation, removal or death.
- Locate and validate hard-to-find and obscure types of beneficiaries without wasting time and resources.
- Prevent assets from being distributed under the table: separate heirs' personal property from that of the estate.
- Distribute the estate fairly – even in unusual circumstances – while honoring the decedent's wishes.
- Avoid mistakes – learn what not to do in probate litigation.
- Learn how to act – not react – in unexpected situations.

## CREDIT INFORMATION

The specific continuing education credit(s) listed are for attending the live seminar. The credits may or may not apply for the audio version of this seminar. Please check with your credit board for details. For additional questions regarding continuing education credits, please contact us at **866-240-1890**.

**Accountants** - This is an intermediate level program. Accountant should have a basic understanding of asset protection techniques and tax matters relating to estate planning. No advanced preparation or prerequisites are required. Field(s) of Study -- Administrative Practice; Taxation.

**Financial Planners - 7.0** - This program has been accepted by the CFP Board and qualifies for 7.0 hours of CE credit for CFP Certificants. CFP™, CERTIFIED FINANCIAL PLANNER™ and CFP with flame logo are certification marks owned by the Certified Financial Planner Board of Standards, Inc. These marks are awarded to individuals who successfully complete the CFP Board's initial and ongoing certification requirements.

**CLE - 6.0** - "Oddities and Challenges In Probate Law" is an accredited program under the regulations of the Iowa Supreme Court Commission on Continuing Legal Education. It is planned that this program will provide a maximum of 6.0 hours of regular credit toward the mandatory continuing legal education requirements under the Iowa rule, including 1.0 hour of ethics credit.



NBI, Inc. has been approved as an Authorized Provider by the International Association for Continuing Education and Training (IACET), 8405 Greensboro Drive, Suite 800, McLean, VA 22102. NBI, Inc. DBA National Business Institute has awarded 0.6 CEUs to participants who successfully complete this program. (Provider #4558)



NBI, Inc. is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Nashville, TN, 37219-2417. Web site: [www.nasba.org](http://www.nasba.org)

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June 10	Accounting 101 for Attorneys (50424ER)
June 12	21st Annual Advanced Estate Planning Techniques (50427ER)
June 26	Advanced Expert Witness Deposition Tactics (50454ER)

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manual — \$99      cd and manual — \$199

*Note: Prices may vary by topic when looking online.*

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By: George F. Davison Jr., Jessica A. Doro, Matthew D. Gardner, Dell A. Richard and Melvin O. Shaw.

#### HANDLING A SOCIAL SECURITY DISABILITY CASE

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#### HOW TO SUCCESSFULLY RESOLVE AUTOMOBILE INJURY CASES

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**ROSS F. BARNETT** is a shareholder in the Des Moines firm of Abendroth and Russell, P.C., where he practices primarily in the areas of real estate and probate with an emphasis on landlord/tenant litigation. Mr. Barnett is co-writer of *Collecting From Tenants in Iowa: The Controlling Law* and has lectured to various professional groups on landlord/tenant law and residential and commercial eviction issues. He is a member of the American Bar Association and the Iowa State Bar Association (member, Real Estate, Title Examination and Probate sections). He earned his B.A. degree from Grinnell College and his J.D. degree, with honors, from Drake University. (Des Moines location)

**BRUCE L. BUTLER** is a sole practitioner in Des Moines, Iowa. His main areas of practice are probate, real estate and taxation. Mr. Butler is a member of the Iowa State Bar Association. He earned his B.A. degree from Eisenhower College and his J.D. degree from Drake University. (Des Moines and Cedar Rapids locations)

**JASON M. STEFFENS** is a member with Simmons Perrine Moyer Bergman PLC, where his main areas of practice are general litigation, banking litigation, business and commercial litigation, and insurance defense. Mr. Steffens is a member of the Iowa State Bar Association, past chair of the Linn County Bar (Technology Committee). He earned his B.A. degree, magna cum laude, from Wartburg College and his J.D. degree, with distinction, from the University of Iowa College of Law. (Cedar Rapids location)

**KYLE W. WILCOX** is an attorney with Simmons Perrine Moyer Bergman PLC, where his main areas of practice are estate planning, probate, guardianship/conservatorship, taxation, and corporate and business law. Mr. Wilcox is a member of the Iowa State Bar Association, Linn County Bar and Cedar Rapids Estate Planning Council. He earned his B.A. degree, magna cum laude, from the University of Northern Iowa and his J.D. degree, with honors, from the University of Iowa. (Cedar Rapids location)

## DES MOINES (Hotel located in West Des Moines) JUNE 29

### West Des Moines Marriott

1250 74th Street, West Des Moines IA 50266  
Phone 515-267-1500

## CEDAR RAPIDS — JUNE 30

### Clarion Hotel and Convention Center

525 33rd Avenue, Southwest, Cedar Rapids IA 52404  
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*Oddities and Challenges in Probate Law*

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#### AUDIO RECORDINGS

This seminar will be recorded in its entirety. If you can't attend, you can still obtain the benefits of the information provided by purchasing the manual and CD. See the registration form to order.

#### CANCELLATION

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\*Pre-registration is encouraged. If you need to register at the door, you may wish to call us first to confirm availability and to receive information regarding schedule or location changes.

### SCHEDULE

REGISTRATION TIME 8:30 — 9:00 am

SEMINAR TIME 9:00 am — 4:30 pm

Complimentary snacks and refreshments are provided. Lunch is on your own.

### TUITION

\$345 for the first registrant

\$335 for each additional registrant

# ODDITIES AND CHALLENGES IN PROBATE LAW

Please check appropriate box

- June 29**  
Des Moines, IA (47332ER)
- June 30**  
Cedar Rapids, IA (47331ER)

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Does this confirm a phone or fax registration?  Yes  No

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Please photocopy this form for multiple registrants.

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