SKILLS TRAINING for ESTATE PLANNERS

American Bar Association

VIRTUAL CONFERENCE

September 17 – 18, 2026

SKILLS TRAINING INSTITUTE *for* ESTATE PLANNERS
American Bar Association

September 2026 - June 2027

Sponsored by

ABA
AMERICAN BAR ASSOCIATION
Real Property, Trust and Estate Law Section

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Real Property, Trust and Estate Law Section

This program offers a streamlined, practice-focused introduction to estate planning for attorneys building skills in trusts and estates. Ideal for young lawyers and those transitioning into the field, the course delivers a strong foundation in core estate planning principles. Led by a distinguished faculty of subject-matter experts, the curriculum covers a broad range of essential topics in a clear and accessible format.

PROGRAM BOARD

Program Board:

Jeffrey Hopkins

John Strohmeyer

Carole Bass

Marissa Dungey

PROGRAMMING SCHEDULE

THURSDAY, SEPTEMBER 17, 2026

ALL TIMES ARE CENTRAL STANDARD TIME

9:00 – 9:30 AM

Welcome

A brief welcome reception to discuss the Skills Training for Estate Planners program and meet fellow attendees.

9:00 – 10:30 AM

Basics of Estate Planning

This session will discuss an overview of the estate planning process, from the initial client intake through the final execution of the plan, and beyond. We will discuss document and drafting considerations, the estate planning team approach, as well as the softer side of planning. Estate planning is a profound and daunting endeavor for clients. What impact will you have in your clients' lives?

Speakers:

Hugh Drake
Brown Hay & Stephens
Springfield, IL,

Samantha M. Contreras
Harrison LLP
Chicago, IL

10:45 AM – 12:15 PM

Introduction to Estate, Gift, and GST Tax

This session will provide an introduction to the federal transfer tax rules governing lifetime gifts and transfers at death. We will discuss the basic principles of the estate and gift tax together with their interaction with the generation-skipping transfer tax. Among the topics to be discussed include the gross estate for federal estate tax purposes, valuation, relevant deductions, the unified credit and tax calculations, portability, taxable gifts, exclusions from gift tax, gift-splitting, qualified disclaimers, and generation-skipping transfers and related definitional terms.

Speakers:

Marissa Dungey
Dungey Dougherty PLLC
Greenwich, CT

Emily A. Plocki
Venable LLP
Washington, DC

12:30 – 1:15 PM	***How to AI-Proof Your Career as a Young Trust and Estates Attorney*** **Diversity in the Profession Luncheon** The panel will explore practical strategies for young trusts and estates attorneys to future-proof their careers in an era of increased presence of AI, emphasizing cultivating the interpersonal expertise and professional development habits with diverse perspectives that ensure long-term career resilience that technology cannot replicate, as well as discussing some of the ethical and practical uses of AI to work more collaboratively, efficiently and effectively. ***This session is not for CLE credit. ***	***Speakers:*** **Brian Balduzzi** *Holland & Knight LLP* Philadelphia, PA **Carly Johnson** *Maslon LLP* Stillwater, MN **Trevor Mason** *Miller Johnson* Grand Rapids, MI
1:30 – 2:30 PM	***Testamentary Estate Planning: Marital and Credit Shelter Formulas*** A discussion about the various clauses common to marital and credit shelter trusts, taxation issues and how to approach drafting such trusts.	***Speakers:*** **Brent Berselli** *Holland & Knight LLP* Portland, OR **Trevor Mason** *Miller Johnson* Grand Rapids, MI
2:45 – 3:45 PM	***Passing by Law or by Contract – Non-Probate Assets, Charitable Pledges, and Marital Rights*** A comprehensive estate plan takes into account nonprobate assets that will not pass through even the most well-drafted estate plan. These are assets that pass by operation of law, by contract, or by beneficiary designation. Certain assets come up in almost every estate including assets held in joint tenancy with rights of survivorship, beneficiary designations on retirement accounts, insurance policies, or accounts, and community property in applicable states. Less common are assets passing by contract including (i) retirement plans under ERISA or the plan documents, (ii) obligations under a pre- or post-nuptial agreement or divorce settlement	***Speakers:*** **Rachel Lee** *Strategic Planning Law Group, P.C.* Los Angeles, CA **Natasha McFarland** *Harrison, LLP* Washington, D.C.

agreement, and (iii) charitable pledges. This program will cover these non-probate transfers, including the complex rules concerning retirement accounts, and tax and practical considerations.

4:00 – 5:00 PM

Trust and Estate Disputes

Although many estate planning arrangements are implemented without controversy, given family dynamics involved in such planning, drafting attorneys should be mindful of the possibility that family members will disagree. Those who are dissatisfied with an estate plan may resort to court proceedings. This segment of the Skills Training program will introduce attendees to the essential concepts of probate litigation, including will and trust disputes, contests, and fiduciary litigation. Those engaged in the estate planning process should be aware of the manner in which probate litigation arises so that they can plan to avoid such disputes (as much as possible). After reviewing those concepts, this segment will explore some of the planning approaches that can be pursued to avoid probate litigation.

Speakers:

Emma Connor
Prather Ebner Wilson
Chicago, IL

Tyler Murray
Baker Botts
Dallas, TX - BLJ

FRIDAY, SEPTEMBER 18, 2026

ALL TIMES ARE CENTRAL STANDARD TIME

9:00 – 10:00 AM

Basics of Estate and Trust Administration

The session will review the steps in an estate administration and considerations for executors, as well as the operational side of trusts including the role of trust accountings and the duties of a trustee.

Speakers:

John Strohmeyer
John Strohmeyer Law
Houston, TX

Molly Depew
Sullivan & Worcester
New York, NY

10:15 – 11:15 AM

Drafting with Corporate Fiduciaries in Mind

This presentation is tailored for legal professionals and trust administrators, focusing on the intricacies of drafting trust documents with corporate fiduciaries in mind. This session aims to provide valuable tips, drafting guidelines, and an overview of what corporate fiduciaries seek in trust documents. Discover the common pitfalls that can lead to disastrous outcomes and learn best practices to ensure clarity, compliance, and flexibility in your trust drafting process.

Speakers:

Keith Dossiere
J.P. Morgan Private Bank
Dallas, TX

TBD

11:30 AM – 12:30 PM

Planning for Long-Term Care and Individuals with Special Needs

Planning options for long-term care and individuals with special needs, including Medicaid benefits and the drafting of special needs trusts.

Speakers:

David English
University of Missouri School of Law
Columbia, MO

Benji Rubin
Rubin Law
Chicago, IL

12:45 – 1:15 PM

Leader's Lunch

Network with other program attendees and the Section of Real Property, Trust and Estate Law's leaders over lunch. Learn more about the section, how to get involved, and our other programs.

***This session is not for CLE credit. ***

1:30 – 2:30 PM

Dealing with Declining Capacity in Adults: Navigating Problems of Cognitive Decline

Unique challenges arise when adults enter the gray area of "marginal capacity"—adults who are living independently but who might mismanage their assets, neglect their own safety or health needs, or be vulnerable to fraud and abuse. This program will focus on the legal and practical remedies available to supportive family members and friends of adults who show signs of diminished and marginal capacity.

Speakers:

Sandra D. Glazier
Sandra D. Glazier PC
Troy, MI

Carly Johnson
Maslon LLP
Stillwater, MN

Anthony La Ratta
Archer & Greiner, P.C.
Haddonfield, NJ

2:45 – 3:45 PM

Common Irrevocable Trust Estate Planning Techniques

This presentation offers a comprehensive overview of advanced trust planning techniques designed to help clients efficiently transfer wealth and minimize transfer tax exposure. Participants will explore the structure, benefits, and practical considerations of Intentionally Defective Grantor Trusts (IDGTs), Spousal Lifetime Access Trusts (SLATs), Irrevocable Life Insurance Trusts (ILITs), Grantor Retained Annuity Trusts (GRATs), Qualified Personal Residence Trusts (QPRTs), and Charitable Lead and Remainder Trusts (CRTs/CLTs). The program will address both tax and non-tax considerations behind each strategy, providing attendees with a solid foundation for advising high-net-worth individuals and families.

Speaker:

Christine Quigley
Schiff Hardin LLP
Chicago, IL

Christina Romero
Katten Muchin Rosenman LLP
New York, NY

4:00 – 5:00 PM

Ethics for Estate Planners

The presentation covers important ethical aspects of representing estate planning clients. Two fundamental issues involve confidentiality and loyalty (conflicts of interest) that are especially relevant when representing couples. The program will also discuss other conflict issues, including gifts to the lawyer or the lawyer's family, naming the lawyer to serve as personal representative or trustee, and the subsequent representation of only one client when the lawyer formerly represented the couple. In addition, the discussion will include confidential communications when representing a fiduciary as well as the requirements for disclosing the basis for fees. Applicable rules include Model Rules 1.5 (fees), 1.6 (confidentiality), 1.7 (conflicts of interest), 1.8 (gifts to drafter), 1.9 (duties to former clients), and 1.18 (duties to prospective clients).

Speaker:

Deadra Woods Stokes
IIT Chicago-Kent College of Law
Chicago, IL

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PROGRAM DETAILS

PRICING:

$695	RPTE Section Member Registration Rate
$795	ABA Member Registration Rate
$895	General Registration Rate
$349	Government Registration Rate

MEETING FORMAT

Skills Training 2026 will be presented virtually.

REGISTRATION

Register online at rpteskillstraining.com. To register at discounted rates, ABA members will need an ABA identification number, which may be found on your ABA membership card. Non-ABA members may register online by creating a new customer account. You may also join the ABA and Section to take advantage of the discounted member rates. Please contact the ABA Service Center at (800) 285-2221 if you need help with the online registration system or if you need assistance in locating your membership number.

CANCELLATION POLICY

Requests for refunds must be made in writing and emailed to rptemeetings@americanbar.org no later September 14, 2026. A $75 administrative fee will be deducted from the amount refunded. The Section will gladly accept substitute registrants for cancellations received at any time.

CLE CREDIT

The ABA will seek 12 hours of CLE credit in 60-minute states, and 14 hours of CLE credit for this program in 50-minute states which includes, 1 hours of CLE Ethics and Professionalism Responsibility credit in 60-minute states and 1.2 hours of CLE Ethics and Professionalism Responsibility credit in 50-minute states. Credit hours are estimated and are subject to each state's approval and credit rounding rules. Please visit the website www.americanbar.org/mcle for general information on CLE at the ABA.

SCHOLARSHIPS

A limited number of scholarships are available based on need. Scholarship awards range from a 25% discount to a full tuition waiver. Scholarship applications must be submitted by September 3, 2026. Submit an application here.

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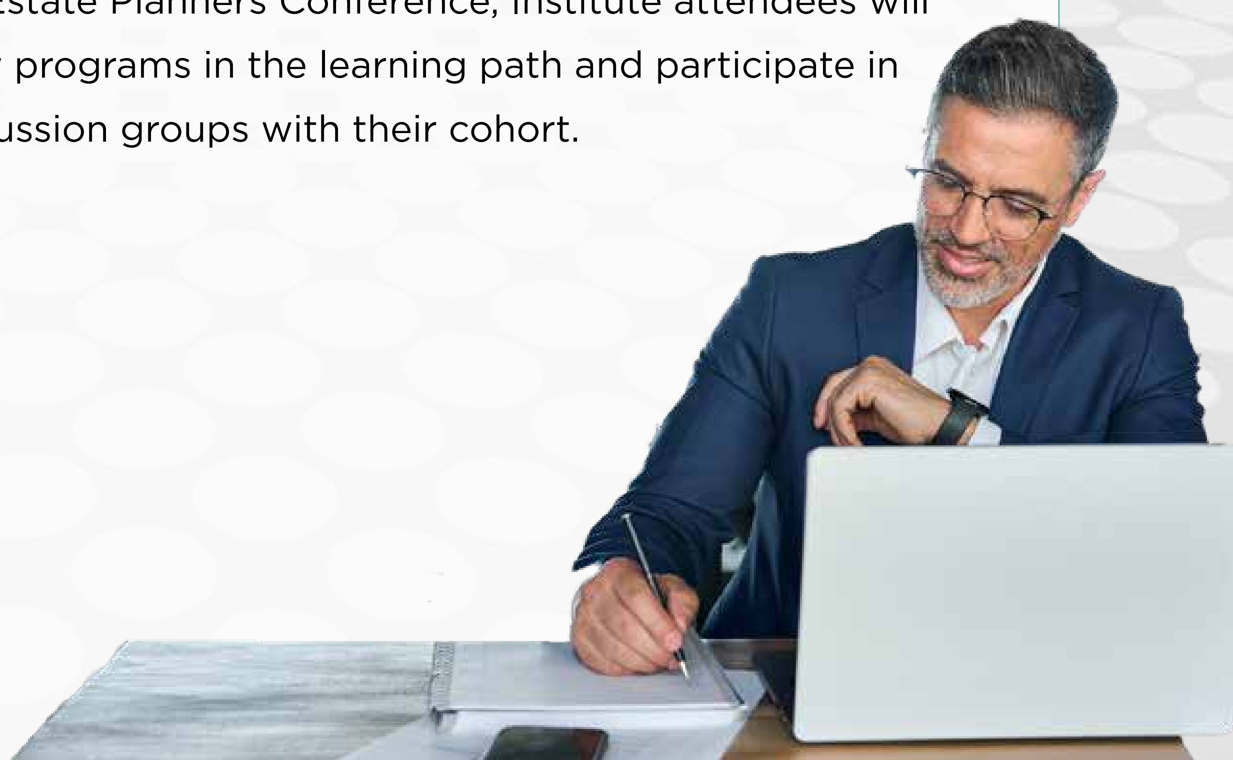
September 2026 - June 2027

The Institute marks a significant expansion of the highly-regarded Skills Training for Estate Planners Conference, offering a structured, cohort-based learning experience that spans the bar year from September to June. This is designed for junior associates and other attorneys who are newer to the fields and offers both foundational and practical guidance through a carefully curated sequence of programming. After participating in the Skills Training for Estate Planners Conference, Institute attendees will view programs in the learning path and participate in discussion groups with their cohort.



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INSTITUTE PROGRAMMING

Basics of Estate, Gift, and Generation Skipping Transfer Tax

Most, if not all, estate planners start from a form when drafting Wills and Trusts. Much of that form is boiler plate. When you're new to drafting, it can be difficult to know when to leave the boilerplate alone and when it should be modified. This Series is designed to give you the tools to be a better draftsperson and be able to explain the provisions to clients and their advisors.

- Estate Tax and the Gross Estate
- Estate Tax Deductions and Reporting
- Taxable Gifts
- Gift Tax and Reporting
- Basics of Generation-Skipping Transfer Tax

Basics of Drafting

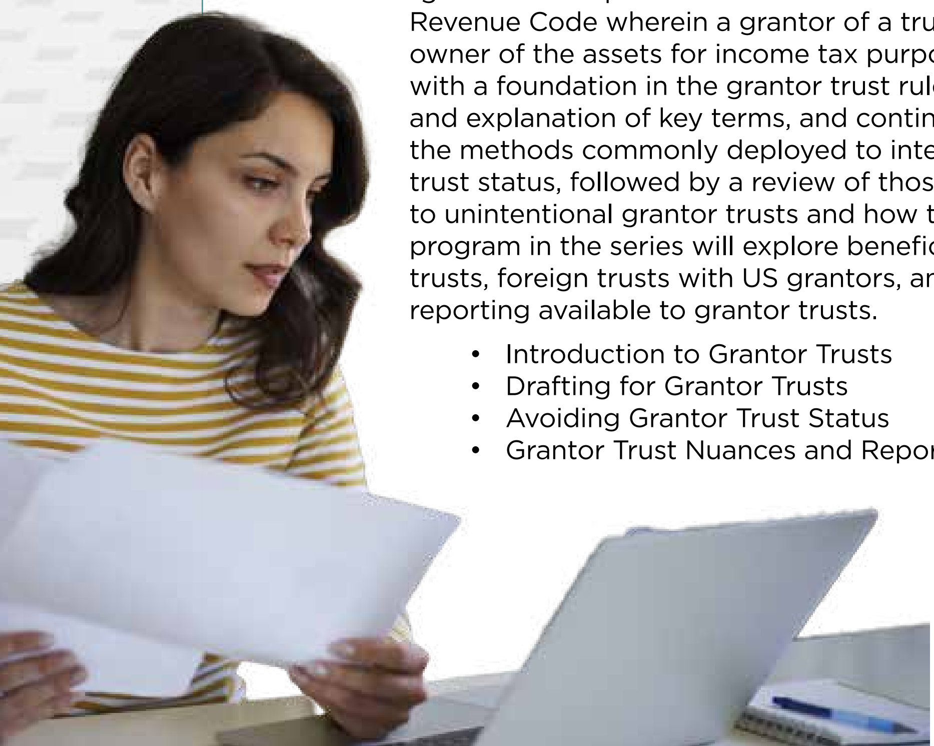
Most, if not all, estate planners start from a form when drafting Wills and Trusts. Much of that form is boiler plate. When you're new to drafting, it can be difficult to know when to leave the boilerplate alone and when it should be modified. This Series is designed to give you the tools to be a better draftsperson and be able to explain the provisions to clients and their advisors.

- Common Provisions in Wills and Trusts
- Tax Considerations in Drafting Trusts
- The Art of Drafting Well

Basics of Grantor Trusts

This series will provide a thorough overview of the so-called "grantor trust" provisions in sections 671-679 of the Internal Revenue Code wherein a grantor of a trust can be treated as the owner of the assets for income tax purposes. The series will start with a foundation in the grantor trust rules including the history and explanation of key terms, and continue with a discussion of the methods commonly deployed to intentionally trigger grantor trust status, followed by a review of those provisions that can lead to unintentional grantor trusts and how to avoid them. The final program in the series will explore beneficiary-defective grantor trusts, foreign trusts with US grantors, and the options for tax reporting available to grantor trusts.

- Introduction to Grantor Trusts
- Drafting for Grantor Trusts
- Avoiding Grantor Trust Status
- Grantor Trust Nuances and Reporting



Basics of Fiduciary Income Tax

This series is an introduction to the income taxation of trusts and estates under Subchapter J of the Internal Revenue Code, with a focus on sections 641-668. The series will start with an in depth review of the key concepts of fiduciary accounting income (FAI) and distributable net income (DNI). Part 2 will apply these concepts to the taxation of simple and complex trusts and estates. The series will end highlighting nuances and special circumstances to be aware of when the general rules do not necessarily apply.

- The Building Blocks of Fiduciary Income Tax
- Taxation of Simple and Complex Trusts
- Special Rules in Fiduciary Income Tax

Basics of Planning with Business Interests

This Series provides a comprehensive overview of the fundamental aspects of gift and estate planning with business interests. Programs include a review of entity types, a complete look at Chapter 14, the estate inclusion risk under Section 2036 with retained interest and control, issues unique to business interests in trust and estate administration, and an introduction to business valuation and how to review appraisal reports. This Series will give attendees a foundation in gift and estate planning with business interests.

- Choice of Entity (LLCs, Corporations, & Partnerships, Oh My!)
- Impact of 2703 and 2704 on Planning
- Introduction to Gift Planning with Business Interests under 2701 and 2702
- Retained Interest and Control under Section 2036
- Issues in the Administration of Trusts and Estates Holding Business Interests (e.g., IRC Section 6166, S-corps)
- Understanding How Business Interests are Appraised

Basics of Charitable Planning

The purpose of this series is to provide an overview of charitable organizations and charitable planning options. After attending these courses, you should have an understanding of the charitable vehicle alternatives, charitable deductions (income, gift and estate), split-interest trusts (charitable remainder trusts and charitable lead trusts), and charitable planning for gifts of complex assets.

- Charitable Organizations 101
- Charitable Tax Deductions – Don't Let the Deduction Get Away
- CRUTs, CLATs, and ...WHAT? An Introduction to Charitable Split Interest Trusts
- Charitable Gifts of Complex Assets

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PROGRAM DETAILS

PRICING:

$1,800	RPTE Section Member Registration Rate
$2,800	ABA Member Registration Rate
$3,500	General Registration Rate

MEETING FORMAT

Skills Training for Estate Planner Institute will be presented though On-Demand programming and regular virtual cohort meetings.

REGISTRATION

Register online at rpteskillstraining.com. You must be registered for Skills Training for Estate Planners 2026 or previously attended the conference in order to register for the Institute. To register at discounted rates, ABA members will need an ABA identification number, which may be found on your ABA membership card. Non-ABA members may register online by creating a new customer account. You may also join the ABA and Section to take advantage of the discounted member rates. Please contact the ABA Service Center at (800) 285-2221 if you need help with the online registration system or if you need assistance in locating your membership number.

CLE CREDIT

ABA programs ordinarily qualify for CLE credit for on-demand programs in Alabama, Alaska, Arizona, California, Colorado, Connecticut, Delaware, Florida, Georgia, Guam, Hawaii, Illinois, Indiana, Maine, Mississippi, Missouri, Montana, Nevada, New Hampshire, New Jersey, New Mexico, New York, North Carolina, North Dakota, Northern Mariana Islands, Puerto Rico, Oklahoma, Oregon, Pennsylvania, South Carolina, Tennessee, Texas, Utah, Vermont, Virgin Islands, Washington, Wisconsin, and West Virginia.
The ABA does not seek direct accreditation of on-demand CLE in Iowa, Idaho, Kansas, Kentucky, Louisiana, Minnesota, Nebraska, Ohio, Rhode Island, Virginia and Wyoming. Some states allow attorneys to earn credit through reciprocity or self-submission. Attorneys may not self-apply for on-demand programs in Kansas or Virginia.
View accreditation information for your state.

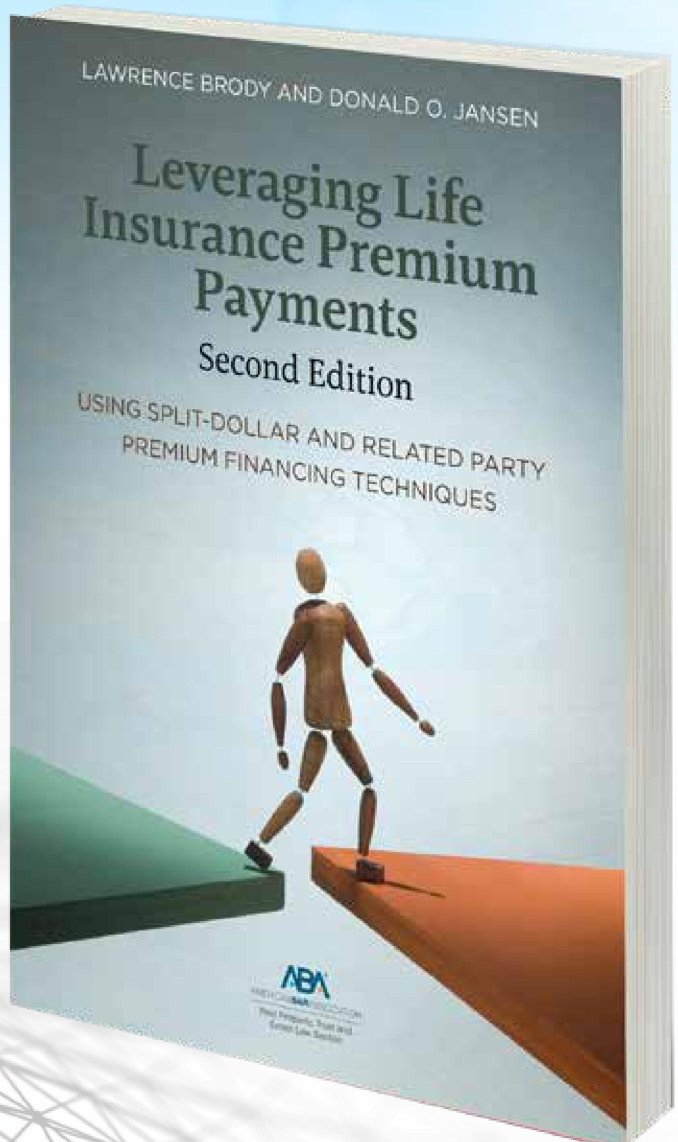
Please note that some states may not approve specific programs, formats, or topics for credit. Visit this page for additional information on On-Demand CLE.

SCHOLARSHIPS

A limited number of scholarships are available based on need for Skills Training for Estate Planners Institute. Scholarship applications must be submitted by September 3, 2026. For more information on ABACLE Scholarship and to submit an application, visit this page.

RPTE PUBLICATIONS

TRUST AND ESTATE BOOKS



ambar.org/rptebooks

ABA
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SAVE THE DATE

ATLANTA 2027

39th Annual RPTE National CLE Conference

May 5-7, 2027
Loews Hotel
Atlanta, GA

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