

Estate Planning in Depth 2019

June 17 – 21, 2019
Chicago, IL

General Registrant Information

Instructions for Accessing the Electronic Materials

Registration List*

Mandatory CLE Information

Attendance Certificate

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THE AMERICAN LAW INSTITUTE
Continuing Legal Education

Estate Planning in Depth 2019

June 17-21, 2019
Chicago, Illinois

PROGRAM

Monday, June 17, 2019

1-6 p.m. Early Registration, Pritzker Law School, University of Chicago
1:55 p.m. Administrative Remarks —*ALI CLE Staff*

Video Webcast Segment A

2:00 p.m. *Optional Session: Overview of Wealth Transfer Taxation* — *Timothy Halleron, Thomas Olson, Victoria Pambianco Ose, and Sarah Robinson*

3:45 p.m. Networking and Refreshment Break

4:00 p.m. **Overview of Wealth Transfer Taxation** (*continued*)

6:00 p.m. Adjournment for the Day

Tuesday, June 18, 2019

7:00 a.m. Registration and Continental Breakfast

8:05 a.m. Administrative Remarks —*ALI CLE Staff*

Video Webcast Segment B

8:10 a.m. **Introduction and Course Overview**

8:15 a.m. **Estate Planning for Elderly and Disabled Clients** - *Stuart Bear*

10:00 a.m. Networking and Refreshment Break

10:15 a.m. **Incentive Trusts and Planning Across Generations** – *Lauren Wolven*

12:00 p.m. Lunch with Registrants and Faculty (*provided by ALI CLE*)

Video Webcast Segment C

1:30 p.m. **What Do You Mean I Cannot Take That Money? Duties, Responsibilities, Ethics for Fiduciaries and the Attorneys Who Advise Them (Ethics)** – *Stuart Bear, Elizabeth Henry, Mary Radford, and Francis Rondoni*

3:15 p.m. Networking and Refreshment Break

3:30 p.m. **Do I Really Have to Have It Appraised? Planning for and Administration of Unusual and Regulated Assets** – *Wendy Goffe*

5:15 p.m. Adjournment for the Day

Wednesday, June 19, 2019

7:30 a.m. Networking Session and Continental Breakfast

Video Webcast Segment D

8:15 a.m. **The Estate Planner's Guide to Religious Implication in Estate Planning (Ethics)** - *Stacy Singer*

10:00 a.m. Networking and Refreshment Break

10:15 a.m. **It's Hard to Be Good: Sustainable Investing, Wealth Transfer and Tax Planning** - *Jeanette Suarez Hunter and Benetta Jenson*

12:00 p.m. Lunch Break (on your own)

Video Webcast Segment E

1:30 p.m. **The GST Exemption: Allocate Some Time to Understand the Ins and Outs** - *Steven Bonneau*

3:15 p.m. Networking and Refreshment Break

3:30 p.m. **International Estates Planning: Crossing Borders, Navigating Cultures** – *Olivia Brennan and Andrew Stone*

5:15 p.m. Adjournment for the Day; Networking Reception for Registrants and Faculty

Thursday, June 20, 2019

7:30 a.m. Networking Session and Continental Breakfast

Video Webcast Segment F

8:15 a.m. **The Ins and Outs of Inherited IRAs** - *Christopher Hoyt*

10:00 a.m. Networking and Refreshment Break

10:15 a.m. **Pixar for Estate Planners: What You Need to Know About Electronic Wills, Cryptocurrency and Other Digital Property** – *Robert Kirkland and Susan Snyder*

12:00 p.m. Lunch Break (on your own)

Video Webcast Segment G

1:30 p.m. **Overview of Section 199A and Choice of Entity in 2019** – *Thomas Pauloski*

3:15 p.m. Networking and Ice Cream Social

3:30 p.m. **Money Messages: The Psychology of Intergenerational Wealth Transfer and Planning** – *Soraya Tabibi Aguirre*

5:15 p.m. Adjournment for the Day

Friday, June 21, 2019

7:30 a.m. Networking Session and Continental Breakfast

Video Webcast Segment H

8:15 a.m. **Your GPS on Moving to a Lower Tax State: Where to Go, How to Get There, and How Much You Can Really Save** - *Karin Prangle*

10:00 a.m. Networking and Refreshment Break

10:15 a.m. **The Past Year's Most Significant, Curious, or Downright Fascinating Fiduciary Cases** — *Dana Fitzsimons*

12:00 p.m. Networking Break and Refreshment Break

12:15 p.m. **The Art and Science of Discretionary Standards** — *Erica Lord*

2:00 p.m. Adjournment of the course

Total 60-minute hours of instruction: **30.0**, including **3.5** hours of ethics, accepted as such by most, but not all MCLE jurisdictions

36.0 CPE credit hours in Taxes (live group and group-internet-based programs)

Nothing in this program is legal advice. Neither American Law Institute Continuing Legal Education nor the speakers/authors can warrant that these presentations/materials will continue to be accurate, nor do they warrant them to be completely free of errors when delivered/published. These presentations/materials reflect the viewpoints of their speakers/authors and do not necessarily express the opinions of American Law Institute Continuing Legal Education or its sponsors.

The members of the faculty and authors for this program and study materials are contributing their services to further the continuing legal education of their fellow members of the Bar.

INSTRUCTIONS FOR ACCESSING THE ELECTRONIC MATERIALS

You should have received an email last week from ALI CLE, providing you electronic access to the written materials for this course. If you did not receive that email or mistakenly deleted it, below are two ways to access the book while at the course. Note that any materials provided after the email sent out last week – including last minute PowerPoints the speakers may bring with them to the course – can only be accessed today via the HANDOUTS folder. ALL late materials will be added to your my.ali-cle.org account sometime next week.

A. To log into your myALI-CLE account today or anytime in the future:

1. Go to <http://my.ali-cle.org>
2. Log in with your email address and password. (If you don't know your password you can provide your email address in the box at the bottom and a password reset request will be emailed to you.)
3. Click on Digital Content Library at the top
4. Under "Browse your digital content," select "Coursebooks"
5. You'll then see this program listed under your 2019 coursebooks. Click on the linked course title.
6. Choose from downloading the entire book as a zip file or a bookmarked PDF; or download the individual chapter PDFs.

B. To access the handouts folder, which includes the bookmarked PDF of the materials plus any last-minute materials including PowerPoints the speakers bring with them to the course, please type this link into your web browser:

<https://bit.ly/2MHDL3k>

No log-in is necessary to access this folder. Please note that this link will be deactivated soon after the course concludes, and all last-minute materials will be added to your myALI-CLE account.

Registration List

**Estate Planning in Depth 2019
6/17/2019-6/21/2019
Chicago, IL**

<i>NAME</i>	<i>COMPANY</i>	<i>CITY and STATE</i>
Soraya Aguirre	Holland & Hart LLP	Las Vegas, NV
Stuart C. Bear	Chestnut Cambronne P.A.	Minneapolis, MN
Richard Bennett	John Fish Law, LTD	Deerfield, IL
John Bishop		Carmel, IN
Sara Block	Drinker Biddle & Reath LLP	Chicago, IL
Robert Boland	Law Offices of Robert A. Boland	Redwood City, CA
Steven M. Bonneau	The Northern Trust Company	Chicago, IL
Olivia S. Brennan	Kozusko Harris Duncan	Chicago, IL
Joseph Bukowski	Reinhart Boerner Van Deuren s.c.	Madison, WI
Stephanie B. Casteel	Wallace, Morrison & Casteel LLP	Atlanta, GA
Shann Chaudhry	Shann M Chaudhry Attorney at Law	San Antonio, TX
Patricia Davis	Kendricks, Bordeaux, Keefe, Seavoy and Larson, P.C.	Marquette, MI
Stephen Erb	ErbCPA	Ligonier, PA
Dana G. Fitzsimons, Jr.	Bessemer Trust Company, N.A.	Atlanta, GA
Aaron J. Foley	Von Briesen & Roper, S.C.	Milwaukee, WI
Wendy S. Goffe	Stoel Rives LLP	Seattle, WA
Thomas Griesbach	Steimle Birschbach, LLC	Manitowoc, WI
L. Timothy Halleron	McDermott Will & Emery	Chicago, IL
Susan Harrington	Rubin and Rudman LLP	Boston, MA
Emily Heidt	MCM CPAs & Advisors	Louisville, KY
Will Hendrick	Ayco	Highland Park, IL
Elizabeth C. Henry	Chestnut Cambronne PA	Minneapolis, MN
Jeffrey S. Hoffman	Wilson & Johnson P.A.	Naples, FL
Christopher R. Hoyt	University of Missouri-Kansas City, School of Law	Kansas City, MO
Monica Huh	Vanguard	Valley Forge, PA
Jeanette Suarez Hunter	McDermott Will & Emery	Chicago, IL
John Hynds	Hynds, Yohnka, Bzdill & McInerney LLC	Morris, IL
Christopher C. Janson	Mawicke & Goisman, S.C.	Milwaukee, WI
Benetta P. Jenson	J.P. Morgan	Chicago, IL
Julius David Johnson, IV	Turner Padgett Graham & Laney	Florence, SC
Weston C. Kirk	Willamette	Atlanta, GA
Robert K. Kirkland	Kirkland Woods & Martinsen, PC	Liberty, MO
Marcus Knotts		West Lafayette, IN
John Lawlor		Jacksonville, FL
Erica E. Lord	The Northern Trust Company	Chicago, IL
Timothy J. Meinhart	Willamette Management Associates	Chicago, IL
Trina Montalban		Portland, OR
Amy E. Newsome	Frederic Dorwart Lawyers	Tulsa, OK

Registration List

Thomas Olson	McDermott Will & Emery	Chicago, IL
Severiano E. Ortiz	RSM US LLP	Alexandria, VA
Victoria Pambianco Ose	McDermott Will & Emery	Chicago, IL
Elizabeth Pack	Greensfelder, Hemker & Gale, P.C.	Saint Louis, MO
Thomas J. Pauloski	AllianceBernstein L.P.	Chicago, IL
Karin Prangle	Brown Brothers Harriman	Chicago, IL
Mary F. Radford	Georgia State University College of Law	Atlanta, GA
Samuel Robertson	Von Briesen & Roper, S.C.	Milwaukee, WI
Carly Robin	DiMonte & Lizak LLC	Park Ridge, IL
Sarah J. Robinson	McDermott Will & Emery	Chicago, IL
Francis J. Rondoni	Chestnut Cambronne	Minneapolis, MN
Sara Royster	Frederic Dorwart, Lawyers PLLC	Tulsa, OK
Robert Rushton	ALI CLE	Philadelphia, PA
Jeffrey A. Sacks	Six Continents Group LLC	Wilmette, IL
Chet Scheltema	Teeple Hall, LLP	San Diego, CA
Jane H. Seibert	Trebie Properties, LLC	Little Silver, NJ
Stacy E. Singer	Northern Trust Corporation	Chicago, IL
Susan D. Snyder	Northern Trust Corporation	Chicago, IL
J. Andrew P. Stone	Kozusko Harris Duncan	Chicago, IL
James D. Supance	Supance & Howard	Tiffin, OH
Amanda Thatcher	Lewis Roca Rothgerber Christie LLP	Phoenix, AZ
Robert A. Vigoda	Rubin and Rudman LLP	Boston, MA
Grady West		Houston, TX
Lauren J. Wolven	Levenfeld Pearlstein, LLC	Chicago, IL
Michael Yurkanin	Yurkanin Law Firm	Trenton, MI

Total

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MCLE Credit Information
Estate Planning in Depth 2019
June 17-21, 2019
Chicago, Illinois

ALI CLE has compiled the following table of the 48 jurisdictions that have adopted mandatory continuing legal education (MCLE). Please check your state below for number of credits awarded and instructions for procuring your credits.

For further information on your state's MCLE requirements, please contact your MCLE Board or Commission.

State	Substantive Credit	Ethics Credit	Instructions
Alabama	26.5	3.5	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk; you will receive an email from ALI CLE when your attendance certificate is ready. ALI CLE submits attendance to the Alabama State Bar.
Alaska	26.5	3.5	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk; you will receive an email from ALI CLE when your individual attendance certificate is ready. Bar members submit attendance to the Alaska Bar.
Arizona	26.5	3.5	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk; you will receive an email from ALI CLE when your individual attendance certificate is ready. Bar members submit attendance to the State Bar of Arizona.
Arkansas	26.5	3.5	Complete CLE Request Form indicating your jurisdiction and bar number, as well as the Arkansas Certificate of Attendance , and submit both forms to the course registration desk. ALI CLE will sign and forward your Arkansas certificate to the Arkansas CLE Board and email a copy to you for your records.
California	26.5	3.5	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk; you will receive an email from ALI CLE when your individual attendance certificate is ready. Bar members file affidavit of compliance with the California Bar.
Colorado	32	4.2	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk; you will receive an email from ALI CLE when your individual attendance certificate is ready. Bar members submit attendance to the Colorado CLE Commission.
Connecticut	26.5	3.5	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk; you will receive an email from ALI CLE when your individual attendance certificate is ready. Bar members submit attendance to the Connecticut CLE Commission.
Delaware	26.5	3.5	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk, as well as enter your information on the Delaware sign-in/out sheet ; you will receive an email from ALI CLE when your individual attendance certificate is ready. ALI CLE submits attendance to the Delaware Commission on CLE.
Florida	32	4	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk; you will receive an email from ALI CLE when your individual attendance certificate is ready including the Florida Reference number for your use and records; Florida Bar members submit attendance to the Florida Bar.
Georgia	26.5	3.5	Accreditation is pending. Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk; you will receive an email from ALI CLE when your individual attendance certificate is ready. ALI CLE submits attendance to the Georgia Commission on CLE.

State	Substantive Credit	Ethics Credit	Instructions
Hawaii	26.5	3.5	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk; you will receive an email from ALI CLE when your individual attendance certificate is ready. ALI CLE submits attendance to the Hawaii State Bar.
Idaho	26.5	3.5	Accreditation is pending. Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk; you will receive an email from ALI CLE when your individual attendance certificate is ready. ALI CLE submits attendance to the Idaho State Bar.
Illinois	26.5	3.5	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk; you will receive an email from ALI CLE when your individual attendance certificate is ready. Bar members submit affidavits of compliance to the Illinois CLE Commission and attendance certificates upon request.
Indiana	26.5	3.5	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk; you will receive an email from ALI CLE when your individual attendance certificate is ready. ALI CLE submits attendance to the Indiana CLE Commission.
Iowa	26.5	3.5	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk; you will receive an email from ALI CLE when your individual attendance certificate is ready. Bar members submit attendance to the Iowa Office of Professional Regulation
Kansas	31.5	4	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk; you will receive an email from ALI CLE when your individual attendance certificate is ready. Bar members submit affidavits to the Kansas CLE Commission.
Kentucky	26.5	3.5	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk; you will receive an email from ALI CLE when your individual attendance certificate is ready. Bar members submit attendance to the Kentucky State Bar.
Louisiana	26.5	3.5	Accreditation is pending. Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk; you will receive an email from ALI CLE when your individual attendance certificate is ready. ALI CLE submits attendance to the Louisiana State Bar.
Maine	26.5	3.5	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk; you will receive an email from ALI CLE when your individual attendance certificate is ready. ALI CLE submits attendance to the Maine Board of Overseers.
Minnesota	26.5	3.5	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk; you will receive an email from ALI CLE when your individual attendance certificate is ready, including the MN activity number. Bar members submit attendance to the Minnesota Board of CLE.
Mississippi	14.5	3.5	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk; you will receive an email from ALI CLE when your individual attendance certificate is ready. ALI CLE submits attendance to the Mississippi Commission on CLE.
Missouri	31.8	4.2	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk; you will receive an email from ALI CLE when your individual attendance certificate is ready. Bar members submit attendance to the Missouri Bar.

State	Substantive Credit	Ethics Credit	Instructions
Montana	26.5	3.5	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk; you will receive an email from ALI CLE when your individual attendance certificate is ready. Bar members submit attendance to the Montana CLE Commission.
Nebraska	26.5	3.5	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk; you will receive an email from ALI CLE when your individual attendance certificate is ready. ALI CLE submits attendance to the Nebraska CLE Commission.
Nevada	26.5	3.5	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk; you will receive an email from ALI CLE when your individual attendance certificate is ready. ALI CLE submits attendance to the Nevada State Bar.
New Hampshire	26.5	3.5	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk; you will receive an email from ALI CLE when your individual attendance certificate is ready. Bar members submit attendance to the New Hampshire Bar.
New Jersey	31.8	4.2	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk, as well as enter your information on the New Jersey sign-in/out sheet ; you will receive an email from ALI CLE when your individual attendance certificate is ready. Bar members are required to retain certificates for a minimum of 3 years after event date and file biennial affidavit of compliance with the New Jersey CLE Commission.
New Mexico	26.5	3.5	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk; you will receive an email from ALI CLE when your individual attendance certificate is ready. ALI CLE submits attendance to New Mexico MCLE.
New York	31.5	4	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk, as well as enter your information on the New York sign-in/out sheet ; you will receive an email from ALI CLE when your individual attendance certificate is ready. New York attorneys maintain CLE records and file affidavits of compliance with the New York CLE Commission.
North Carolina	26.5	3.5	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk; you will receive an email from ALI CLE when your individual attendance certificate is ready. ALI CLE submits attendance to the North Carolina State Bar.
North Dakota	26.5	3.5	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk; you will receive an email from ALI CLE when your individual attendance certificate is ready. Bar members submit attendance with the North Dakota State Bar.
Ohio	26.5	3.5	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk; you will receive an email from ALI CLE when your individual attendance certificate is ready. ALI CLE submits attendance to the Supreme Court of Ohio Commission on CLE.
Oklahoma	32	4	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk; you will receive an email from ALI CLE when your individual attendance certificate is ready. ALI CLE submits attendance to the Oklahoma Bar Association.
Oregon	26.5	3.5	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk; you will receive an email from ALI CLE when your individual attendance certificate is ready. ALI CLE submits attendance to the Oregon State Bar.

State	Substantive Credit	Ethics Credit	Instructions
Pennsylvania	26.5	3.5	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk; you will receive an email from ALI CLE when your individual attendance certificate is ready. ALI CLE submits attendance to the Pennsylvania CLE Commission.
Puerto Rico	26.5	3.5	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk; you will receive an email from ALI CLE when your individual attendance certificate is ready. Bar members apply directly to the Supreme Court of Puerto Rico CLE Program for accreditation.
Rhode Island	31.5	4	Accreditation is pending. Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk; you will receive an email from ALI CLE when your individual attendance certificate is ready. ALI CLE submits attendance to the Judiciary of Rhode Island.
South Carolina	26.5	3.5	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk; you will receive an email from ALI CLE when your individual attendance certificate is ready. ALI CLE submits attendance to the South Carolina Commission on CLE.
Tennessee	26.5	3.5	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk; you will receive an email from ALI CLE when your individual attendance certificate is ready. ALI CLE submits attendance to the Tennessee Commission on CLE.
Texas	26.5	3.5	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk; you will receive an email from ALI CLE when your individual attendance certificate is ready. ALI CLE submits attendance to the State Bar of Texas.
Utah	26.5	3.5	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk; you will receive an email from ALI CLE when your individual attendance certificate is ready. ALI CLE submits attendance to the Utah Supreme Court Board of CLE.
Vermont	26.5	3.5	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk; you will receive an email from ALI CLE when your individual attendance certificate is ready. Bar members submit attendance to the Vermont Bar Association
Virginia	14	1	Accreditation is pending. Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk; you will receive an email from ALI CLE when your individual attendance certificate is ready, including the Virginia Form 2 .
Virgin Islands	31.8	4.2	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to Registration desk; you will receive an email from ALI CLE when your individual attendance certificate is ready. Participants apply directly to the VI Bar Association for accreditation.

State	Substantive Credit	Ethics Credit	Instructions
Washington	28.25	1.75	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to course registration desk. An attendance certificate will be emailed for your records. ALI CLE submits attendance to the Washington State Bar.
West Virginia	31.8	4.2	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to ALI registration desk. An attendance certificate will be emailed for your records. ALI CLE submits attendance to the West Virginia State Bar.
Wisconsin	31.5	4	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to course registration desk. An attendance certificate will be emailed for your records. Bar members submit attendance to the Wisconsin Board of Bar Examiners.
Wyoming	tbd	tbd	Complete CLE Request Form indicating your jurisdiction and bar number and submit form to course registration desk. An attendance certificate will be emailed for your records. Bar members submit attendance with the Wyoming State Bar.
CPE CREDIT	Accountants often may earn CPE credit for attending ALI CLE programs. If one uses the standard formula, attendance at the entire program entitles the registrant to 36 CPE credits. Print name and enter hours attended on the CPE sign-in/sign-out sheet each day of the course. ALI CLE 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. Telephone: 615/880-4200.		
Questions?	If you have questions about MCLE approval, specialization approval, other professional education credits or credit reporting, please contact the MCLE Team at (215) 243-1600 or toll-free at (800) 215-6397, or by e-mail at TeamMCLE@ali-cle.org.		

ALI CLE COURSE EVALUATION (PART ONE)

Course Title: **Estate Planning in Depth 2019**

Date: **June 17-21, 2019**

Location: **Chicago, Illinois**

Course No: **CA020**

To help us provide continuing education most beneficial to you, we ask that you complete this course evaluation form. **Please mark one response unless otherwise noted.**

1. Did the course fulfill the objectives set forth in the brochure?

1 ☐ Yes 2 ☐ No

2. The pace at which the material was covered was . . .

1 ☐ Too slow
2 ☐ About right
3 ☐ Too fast

3. Were the subjects effectively treated within the time allotted?

1 ☐ Yes 2 ☐ No

4. For your experience and preparation this course was . . .

1 ☐ Too easy
2 ☐ Somewhat easy
3 ☐ About right
4 ☐ Somewhat difficult
5 ☐ Too difficult

5. Do you practice extensively in the subject of this course?

1 ☐ Yes 2 ☐ No

6. Your purpose(s) in attending

(check one or more responses):

- 1 ☐ To get help with a specific problem in my office
- 2 ☐ To improve a specific legal skill
- 3 ☐ To learn about new legal developments
- 4 ☐ To enhance my general legal knowledge
- 5 ☐ To expand my current practice
- 6 ☐ To gain insight into what other practitioners are doing
- 7 ☐ To fulfill continuing education requirements
- 8 ☐ Other (please explain in Part Two)

7. Were your purposes in attending met?

1 ☐ Yes 2 ☐ No

8. The COURSE MATERIALS were . . .

1 ☐ Excellent
2 ☐ Good
3 ☐ Fair
4 ☐ Poor

9. OVERALL, the COURSE was . . .

1 ☐ Excellent
2 ☐ Good
3 ☐ Fair
4 ☐ Poor

10. EVALUATION OF FACULTY 1=Excellent 2=Good 3=Fair 4=Poor	Content	Presentation	Materials	Overall
1. FACULTY AS A WHOLE				
2. Bear				
3. Singer				
4. Aguirre				
5. Bonneau				
6. Brennan				
7. Fitzsimons				
8. Goffe				
9. Halleron				
10. Henry				
11. Hoyt				
12. Hunter				
13. Jenson				
14. Kirkland				
15. Lord				
16. Olson				
17. Ose				
18. Pauloski				
19. Prangley				
20. Radford				
21. Robinson				
22. Rondoni				
23. Snyder				
24. Stone				
25. Wolven				
26.				
27.				
28.				
29.				
30.				

Space for comments is provided in PART TWO.

(over, please)

Please evaluate each of the items below by placing a checkmark on the appropriate line. Elaborate as necessary in Part Two.

	Excellent	Good	Fair	Poor
11. Meeting room environment	<u> </u>	<u> </u>	<u> </u>	<u> </u>
	1	2	3	4
12. Hotel/facility	<u> </u>	<u> </u>	<u> </u>	<u> </u>
	1	2	3	4
13. City as course site	<u> </u>	<u> </u>	<u> </u>	<u> </u>
	1	2	3	4
14. On-site course administration	<u> </u>	<u> </u>	<u> </u>	<u> </u>
	1	2	3	4

15. Your current practice/work setting (*check one*):

- | | |
|---|---|
| 1 <input type="checkbox"/> Sole practitioner | 9 <input type="checkbox"/> Other legal work |
| 2 <input type="checkbox"/> Firm of 2-10 lawyers | 10 <input type="checkbox"/> Law faculty |
| 3 <input type="checkbox"/> Firm of 11-50 lawyers | 11 <input type="checkbox"/> Law student |
| 4 <input type="checkbox"/> Firm of 51-100 lawyers | 12 <input type="checkbox"/> Accountant |
| 5 <input type="checkbox"/> Firm of 101+ lawyers | 13 <input type="checkbox"/> Actuary |
| 6 <input type="checkbox"/> In-house corporate counsel | 14 <input type="checkbox"/> Chartered Life Underwriter |
| 7 <input type="checkbox"/> Government lawyer | 15 <input type="checkbox"/> Trust officer |
| 8 <input type="checkbox"/> Judge or judicial staff | 16 <input type="checkbox"/> Other (please specify): _____ |

16. Years in practice/work:

- 1 ☐ 0-5 years
 2 ☐ 6-10 years
 3 ☐ 11-15 years
 4 ☐ More than 15 years

17. Size of community in which you practice/work:

- 1 ☐ Fewer than 50,000 people
 2 ☐ 50,000-99,999 people
 3 ☐ 100,000-249,999 people
 4 ☐ 250,000-499,999 people
 5 ☐ 500,000 to a million people
 6 ☐ More than a million people

18. Where do you practice/work?

- 1 ☐ Locally (within commuting distance of the course)
 2 ☐ Not locally, but within 100 miles of the course
 3 ☐ 100-500 miles from the course
 4 ☐ More than 500 miles from the course

19. Is this the first ALI CLE program you have attended?

- 1 ☐ Yes 2 ☐ No

Name and address (optional):

Thank you for completing Part One of this evaluation form. Please complete Part Two and return your completed form to the registration desk or mail it to the ALI CLE Office of Courses of Study, 4025 Chestnut Street, Philadelphia, PA 19104-3099.

☐ This is a testimonial and you may include my comments, my name (which is _____), and my firm's name (if applicable) in future brochures for this course.

This image shows a single sheet of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

21. ALI CLE has a history of outreach to underrepresented groups in the legal community and is firmly committed to providing a welcoming environment and ensuring that the attorneys who speak and write for our organization represent the increasing diversity of our profession. We welcome suggestions for new speakers and authors to support the full participation of all of the talent in our profession.

Please provide the names, affiliations and/or office addresses (if known), and areas of expertise of individuals, particularly from underrepresented groups, whom you would suggest for ALI CLE course faculties and/or as authors for ALI CLE publications. Self-nominations are, of course, welcome. Thank you.

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