The Mission of the ISBA Trusts & Estates Section:

To be responsible for activities relating to the education of probate, estate planning and trust law practitioners; to promote and work for the development, modernization and improvement of legislation relating to the estate planning, probate and trust areas of the law; to review relevant matters and issues, and to study and recommend solutions to various problems involving the public, the courts, and attorneys insofar as the areas of concern of the section are involved.

Continuing Legal Education

The Section sponsored the following programs during the year:

- Illinois Uniform Powers of Appointment Act (12/13/18)
- Valuation and Succession Planning for Intellectual Property (02/07/18)
- What Every Estate Planner Should Know About Special Needs Planning (03/28/19)
- The Rules of Professional Conduct as the Apply to Estate Planning and Estate Trust Administration (04/09/19)

Section members also receive discounts on section-sponsored CLE programs.

Legislation

The Section Council reviews proposed legislation that may affect their members’ practice area. Highlights of the most recent legislative session include:

1. Number of bills reviewed: 35
2. Significant legislation:
   a. HB 1471 – Illinois Trust Code
   b. SB 1518 – Rewrite of adult guardianship statute
   c. HB 2816 – GAL fees in adult guardianship

Newsletters

During the 2018-19 bar year, the Section published 12 newsletters. Articles included:

- Chair’s column (July 2018)
- Co-editors’ note (July 2018)
- Four tips on avoiding trust & family breakdowns (July 2018)
- Ethics Corner: Ethical issues in Illinois estate planning and trust/estate administration (July 2018)
- A summary of the Trusts & Estates Section’s April 2018 business meeting (July 2018)
- Thank you to our authors (July 2018)
- Co-editors’ note (Aug. 2018)
- Big bank versus little client: How to deal with unreasonable requests and demands (Aug. 2018)
- Presumptions and powers of attorney (Aug. 2018)
- Ethics Corner: Ethical issues in Illinois estate planning and trust/estate administration (Aug. 2018)
- Income tax consequences for probate estates when resolving claims for less than the full amount (Sept. 2018)
- What every Illinois estate planner should know about elder mediation (Sept. 2018)
- Presumptions and powers of attorney (Sept. 2018)
- Estate planning for the second marriage (Sept. 2018)
- Estate planning for the second marriage (Oct. 2018)
- A summary of the Trusts & Estates Section’s September 2018 business meeting (Oct. 2018)
- Estate planning for non-human animals by human animals: Why, who, and how (Dec. 2018)
- Use it or lose it: The IRS proposed regulations will not clawback sunsetting exemption amounts (Jan. 2019)
- The effect of an order declaring heirship (Jan. 2019)
- Significant legislation: (02/07/18)
  a. HB 1471 – Illinois Trust Code
  b. SB 1518 – Rewrite of adult guardianship statute
  c. HB 2816 – GAL fees in adult guardianship

ISBA Central

Members of the ISBA section get free access to the section’s community on ISBA Central. The ISBA Central community allows section members to pose questions, answer questions, and share information with fellow section members from around the state.