



Section on Trusts & Estates

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.

General:

- ◆ Section dues are \$30 per year.
- ◆ To join, go to www.isba.org/sections

[Continuing Legal Education](#)

The Section sponsored the following program(s) during the year:

- ◆ **Guardianship Boot Camp** (12/15/17)
- ◆ **5th Annual Elder Law Bootcamp: Basics and Beyond-CO SPONSOR** (4/26/18-4/27/18)
- ◆ **Representing the Elderly Real Estate Client-CO SPONSOR** (5/17/18)
- ◆ **Malpractice Avoidance Program** (3/9/18)
- ◆ **Mastering the Dead Man's Act** (4/18/18)

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: 76
2. Significant legislation:
 - a. House Bill 4702 - Uniform Power of Appointment Act
 - b. Senate Bill 3120 - Defines claims against decedent's estate for health care expense prior to death

[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.

[Newsletters](#)

During the 2017-18 bar year, the Section published 12 newsletters.

Articles included:

- ◆ Message from the Chair (July 2017)
- ◆ Estate tax account transcript now formally recognized as a substitute for an Estate Closing Letter, but should you use it? (July 2017)
- ◆ Heirships (July 2017)
- ◆ Case law update (July 2017)
- ◆ Getting to know the Trusts & Estates council members (Aug. 2017)
- ◆ Posthumously conceived children reborn in Illinois re Social Security survivor benefits and inheritance (Aug. 2017)
- ◆ Public Act 99-743: Deeds in Trust and Acceptance by the Trustee (Aug. 2017)
- ◆ Summary of the Trusts & Estates Section's April 2017 business meeting (Aug. 2017)
- ◆ Mom had a life insurance policy, but we can't find it! (Aug. 2017)
- ◆ Who gets the painting on the living room wall? (Sept. 2017)
- ◆ 20 estate planning tips (Sept. 2017)
- ◆ Flinn Report Summary – April 7, 2017 through June 30, 2017 (Sept. 2017)
- ◆ Technology at end-of-life: Estate planning for Millennials (Sept. 2017)
- ◆ Bank does not owe a duty of ordinary care to maintain and guard a customer's accounts and protect the account holder from fraud, abuse and waste (Sept. 2017)
- ◆ Getting to know the Trusts & Estates Council members (Sept. 2017)
- ◆ In re Estate of Thomas F. Shelton: Insights and impact (Part I) (Oct. 2017)
- ◆ Claims in probate (Oct. 2017)
- ◆ Is a POA revoked by appointment of a guardian? (Oct. 2017)
- ◆ Flinn Report Summary – July 7, 2017 through August 25, 2017 (Oct. 2017)
- ◆ A summary of the Trusts & Estates Section's June, 2017 business meeting (Oct. 2017)
- ◆ Getting to know the Trusts & Estates Council members (Oct. 2017)
- ◆ A call to account (Nov. 2017)
- ◆ Powers of attorney, living wills, advance directives and religion (Nov. 2017)
- ◆ U.S. v. Balice: IRS successfully pierced trust (Nov. 2017)
- ◆ Getting to know the Trusts & Estates Council members (Nov. 2017)
- ◆ Post-death conservation easements—Another way to save the farm? (Nov. 2017)
- ◆ The bond that's not: How to convey real estate in an unprobated estate (Dec. 2017)
- ◆ Probate citation proceedings (Dec. 2017)
- ◆ Getting to know the Trusts & Estates Council members (Dec. 2017)
- ◆ Agency, Powers of Attorney, co-agency and strict construction (Dec. 2017)
- ◆ Postnuptial agreements: An effective tool in Illinois after marriage (Dec. 2017)
- ◆ Probate citation proceedings: Part 2 (Jan. 2018)
- ◆ Engagement letters for estate planning representations (Jan. 2018)
- ◆ Estate planning during dissolution proceedings (Jan. 2018)
- ◆ Getting to know the Trusts & Estates Council members (Jan. 2018)
- ◆ A summary of the Trusts & Estates Section Council's September, 2017 business meeting (Jan. 2018)
- ◆ Estates and trusts have to file income taxes (Feb. 2018)
- ◆ The Illinois Estate Tax: The surprises continue (Feb. 2018)
- ◆ Flinn Report summary – September 1, 2017 through December 29, 2017 (Feb. 2018)
- ◆ Survival of claims—Renunciation of wills (Feb. 2018)
- ◆ Case law summaries (Feb. 2018)
- ◆ Electronic wills—The future is now (Mar. 2018)
- ◆ Contingent claims: A different take on *Vernon v. Schuster* (Mar. 2018)
- ◆ Flinn Report summary—Jan. 5, 2018 - Feb. 2, 2018 (Mar. 2018)
- ◆ When life gets complicated (Mar. 2018)
- ◆ Beyond taxes and probate: Revive and refine the spendthrift trust (Apr. 2018)
- ◆ Ethics Corner: Ethical issues in Illinois estate planning and trust/estate administration (Apr. 2018)
- ◆ The Vital Records Act amendment (Apr. 2018)
- ◆ A summary of the Trusts & Estates Section's December 2017 business meeting (Apr. 2018)
- ◆ Who's the client? (May 2018)
- ◆ Ethics Corner: Ethical issues in Illinois estate planning and trust/estate administration (May 2018)
- ◆ A summary of the Trusts & Estates Section's February 2018 business meeting (May 2018)
- ◆ Routine estate planning questions from married homeowners (June 2018)
- ◆ New developments in estate planning, elder law, and Medicaid civil rights (June 2018)
- ◆ Ethics Corner: Ethical issues in Illinois estate planning and trust/estate administration (June 2018)