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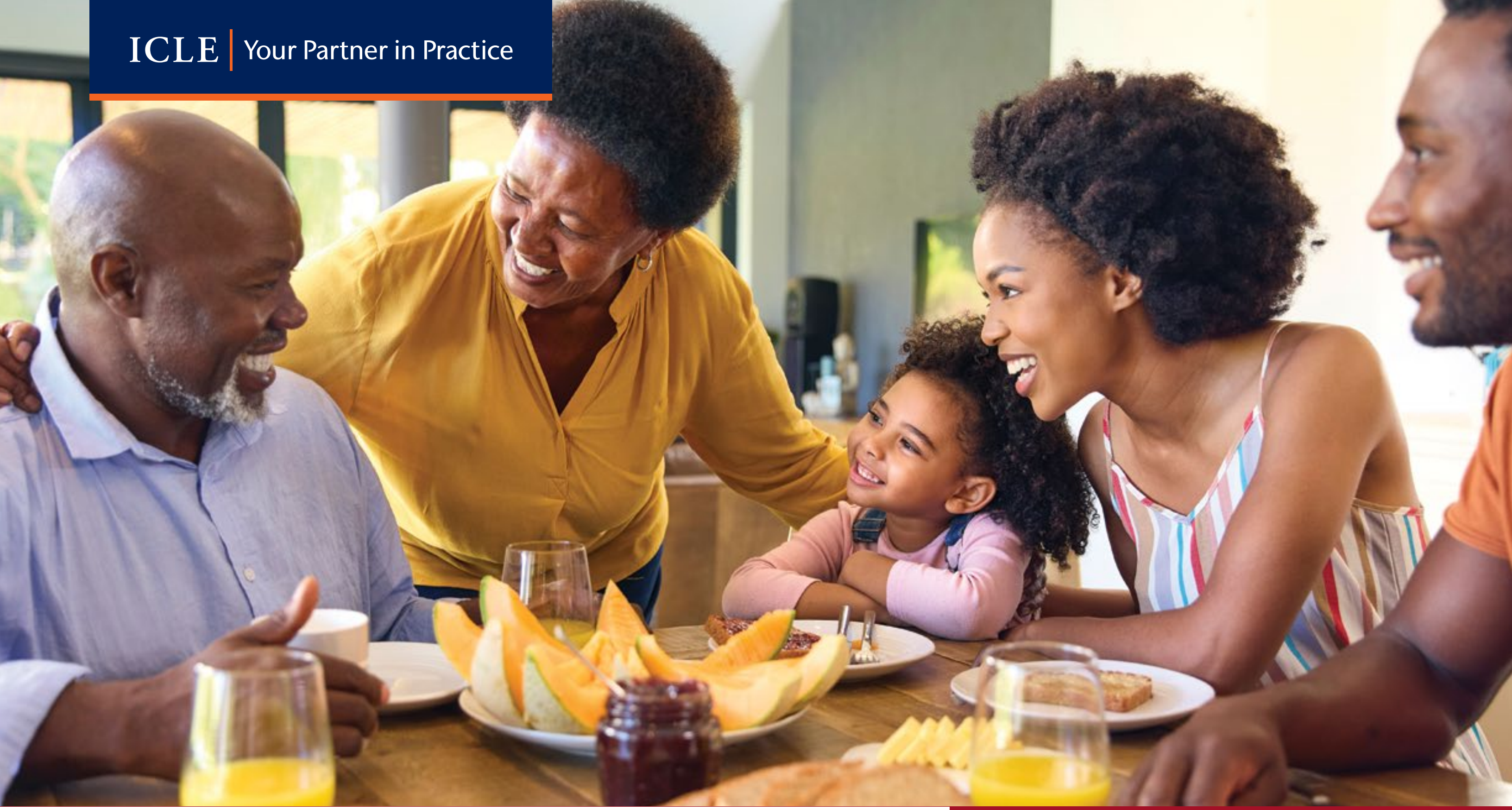

MAY 15–17, 2025, ACME | JUNE 12, 2025, NOVI

65TH ANNUAL

Probate & Estate Planning Institute

Secure Your Clients for Generations

COSPONSOR
Probate & Estate Planning Section of the State Bar of Michigan

ALL-STAR PANEL
Get your EPIC and MTC questions answered.

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INSTITUTE OF CONTINUING LEGAL EDUCATION
The education provider of the State Bar of Michigan

State Bar of Michigan, University of Michigan Law School, Wayne State University Law School, University of Detroit Mercy School of Law, Cooley Law School, Michigan State University College of Law

Secure Your Clients for Generations

Whether you're a new or experienced estate planner, ensure your clients are set for years to come. Get invaluable advice from 28 local and national experts. Ellen K. Harrison walks you through purpose trusts and Edwin P. Morrow III helps you adjust client strategies no matter what happens with the federal estate tax exemption.

In a live Q&A, get your EPIC and MTC questions answered by an all-star panel—everything from the last 25 years through the most recent Omnibus amendments. Get a status update on the CTA's filing deadline.

Attend the institute your way: Plan an extended getaway in Acme with bonus opportunities and resort activities. Or, spend less time out of the office in Novi—now a convenient one-day event that also includes on-demand video sessions to watch at your convenience. See p. 4.

The Best Speakers—from Michigan and Beyond

Ellen K. Harrison
McDermott Will & Emery LLP, *Washington, DC*

Ellen advises clients on a broad range of issues, including income, gift, and estate tax planning. She shares insights on the well-publicized Patagonia purpose trust.

Edwin P. Morrow III
Kelleher + Holland LLC, *Dayton, OH*

Edwin has a distinguished background in tax law, having transitioned his focus to estate planning and trusts. He discusses charitable distributions.

Peter A. Lichtenberg, PhD
Wayne State University Institute of Gerontology, *Detroit*

Dr. Lichtenberg is one of the nation's first board-certified clinical geropsychologists and author of three books. He sheds light on determining mental capacity.

Hon. David M. Murkowski
Kent County Probate Court, *Grand Rapids*

Judge Murkowski has served as chief judge of the court since 2008. He joins an all-star panel that answers all things EPIC and MTC after 25 years.

Raj A. Malviya
Miller Johnson, *Grand Rapids*

Raj focuses his practice on estate/tax planning and asset protection for corporations and individuals. He walks you through the latest CTA implications.

Jennifer L. Remondino
Warner Norcross + Judd, *Grand Rapids*

Jennifer is an award-winning practitioner and chair of the firm's trust and estates practice group. She dives into *Connelly* and its impact on businesses.

Up-to-Date Advice on the Hottest Topics

Purpose Trusts

National speaker Ellen K. Harrison walks you through purpose trusts, which businesses are utilizing more and more. Get a better understanding of this trend through the lens of the well-publicized Patagonia trust, which aimed to protect the environment, as well as cases in Europe.

Estate Tax Exemption

National speaker Edwin P. Morrow III helps you adjust client strategies no matter what happens with the federal estate tax exemption. Plan ahead and get the current thinking on questions like, Will everyone go back to A/B trusts?

Live Q&A on EPIC

Get your EPIC and Michigan Trust Code questions answered by an all-star panel—everything from the last 25 years through the most recent Omnibus amendments. Tackle common themes, lingering pain points, and more.

Corporate Transparency Act

The filing deadline has been challenged. That's where our expert panel comes in. Hear from three well-known practitioners on reporting requirements, including how to tackle compliance challenges.

Business Succession Planning

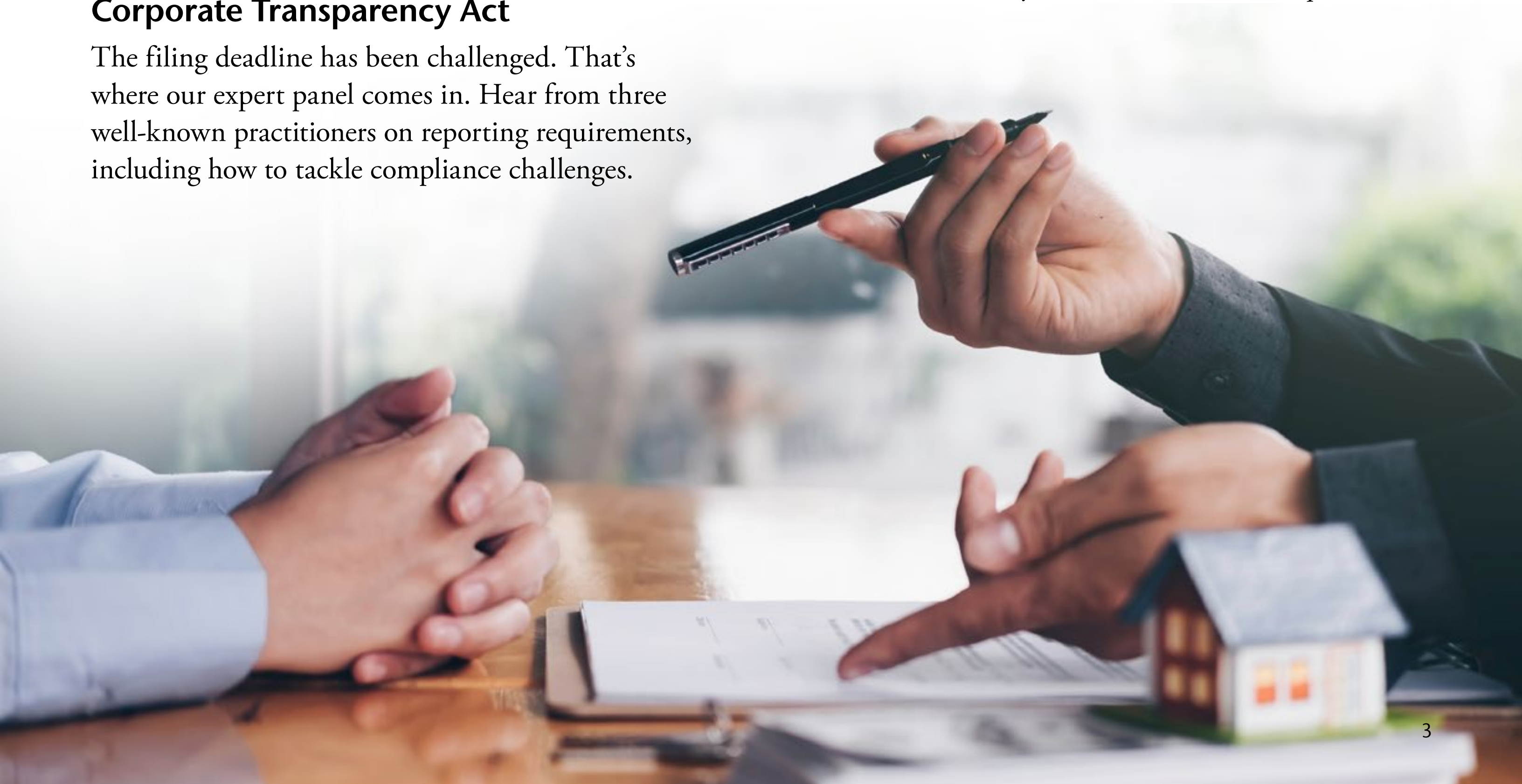
Get a better understanding of *Connelly* and its impact on closely held business owners. Review existing buy-sell agreements and make the right call on whether to restructure. Know when to buy out deceased shareholders and more.

Critical Updates

Stay on top of current caselaw, plus state and federal legislative developments. Gain effective strategies for discussing the latest billing options with clients. Walk away with effective tools for handling Medicaid and special needs.

"You have the best and the brightest from all corners of practice areas in probate."

-Hon. David M. Murkowski,
Kent County Probate Court, *Grand Rapids*



Attend the Institute Your Way

Acme: The Bells and Whistles

Join us for three days of in-person sessions and networking. Make it a true CLE getaway at the Grand Traverse Resort and Spa with downtime for biking, wine tastings, and more. Choose an optional add-on seminar about building a better practice (see p. 11). Plus, exclusive advanced and basic sessions.

Acme Accommodations

Grand Traverse Resort & Spa
100 Grand Traverse Village Boulevard, Acme, MI 49610

A discounted block of rooms has been reserved at Grand Traverse Resort & Spa in Acme under group code ICLE525. Visit www.icle.org/probate/hotel-acme or call 800-968-7352. Reservations must be made by 04/13/25.

Registrants are responsible for their own hotel expenses.

Novi: The Time-Saver

New this year, spend less time out of the office with one jam-packed day in person and the rest on demand. Hear live sessions and network with colleagues at the Suburban Collection Showplace. Plus, get nine video sessions emailed to you so you can watch on demand. This new hybrid option is the best of both worlds for those wanting convenience.

Novi Accommodations

Suburban Collection Showplace
46100 Grand River, Novi, MI 48374

A discounted block of rooms has been reserved at the Hyatt Place Detroit/Novi in Novi under group code G-ICLP. Visit www.icle.org/probate/hotel-novi or call 800-233-1234. Reservations must be made by 05/11/25.

Registrants are responsible for their own hotel expenses.

Acme Agenda

CLE/MCJE: Acme 11.5* CTFA: Pending* LEVEL: Basic/Intermediate/Advanced

PCP PROBATE & ESTATE PLANNING CERTIFICATE PROGRAM ELECTIVE

THURSDAY, MAY 15, 2025

12:00pm Registration and Vendor Showcase
1:00pm Welcoming Remarks and Announcements
1:30pm Sunset of the Federal Estate Tax Exemption
2:30pm Legislative Update
3:15pm Networking Break

	Hot Topics Track	Core Concepts Track
3:30pm	SECURE Act: Where Are We Now?	The Alpha and Omega of Client Relations: Engagement and Exit Letters
4:15pm	Uncapping: Top 10 Property Transfer Traps and How to Avoid Them	Anatomy of a Contested Matter in Probate Court
5:00pm	Questions and Answers	Questions and Answers

6:00pm Networking Reception

FRIDAY, MAY 16, 2025

7:30am Registration, Continental Breakfast, and Vendor Showcase
8:10am Remarks from the State Bar Executive Director
8:30am The Ultimate EPIC Q&A: 25 Years of Progress and Pain Points
9:30am Networking Break

	Trusts Track	Disability Planning Track
9:45am	Charitable Distributions from Trusts and IRAs[1]	Medicaid, Elder Law, and Disability Update 2025[1]
10:25am	Corporate Transparency Act Reporting: Status and Compliance Update	Administering Estates with Estate Recovery Claims
11:05am	Allow Me to Reintroduce Myself: Valuable Trust Tools You May Not Be Using	Determining Capacity
11:45am	Questions and Answers	Questions and Answers

12:00pm Networking Lunch on Premises (Preregistration Required—Limit 100)

	Special Advanced Session	Special Basic Session
1:30pm	Now and Then—Conditionalizing on Future Contingents as a Measure of Freedom in Exercising Powers of Appointment	SPECIAL BASIC SESSION: New Lawyers, You Have the Floor

SATURDAY, MAY 17, 2025

7:30am Registration, Continental Breakfast, and Vendor Showcase
8:30am Caselaw Update
9:15am Understanding and Using Purpose Trusts[1]
10:15am Networking Break

	Business Planning Track	LPM Track
10:30am	Estate Planning for the Farm-Owning Family[1]	How to Build Your Practice: Inheriting or Acquiring Another Lawyer's Practice[1]
11:00am	*Connelly* and Business Succession Planning in 2025[1]	Building a High-Impact Team: Effective Hiring and Utilization of Legal Assistants and Paralegals[1]
11:30am	Figuring Out Family Dynamics for Family Business Succession[1]	An Update on Billing Models 2025 and How to Charge Clients[1]
12:00pm	Questions and Answers	Questions and Answers

***Acme:** No CLE/MCJE/CTFA credit is given for "New Lawyers, You Have the Floor."

***CTFA:** This event will be submitted to the ABA Professional Certifications for CTFA credit review and approval 90 days prior to the event. Total credit approved will be reflected on the ICLE website after approval.

Novi Agenda

CLE/MCJE: Novi 6.25 and On Demand 5.25* CTFA: Pending* LEVEL: Basic/Intermediate/Advanced

THURSDAY, JUNE 12, 2025

PCP PROBATE & ESTATE PLANNING CERTIFICATE PROGRAM ELECTIVE

7:30am	Registration, Continental Breakfast, and Vendor Showcase
8:30am	Welcoming Remarks and Announcements
8:50am	The Ultimate EPIC Q&A: 25 Years of Progress and Pain Points
9:50am	Caselaw Update
10:35am	Networking Break

	Hot Topics Track	Core Concepts Track
10:50am	SECURE Act: Where Are We Now?	The Alpha and Omega of Client Relations: Engagement and Exit Letters
11:40am	Uncapping: Top 10 Property Transfer Traps and How to Avoid Them	Anatomy of a Contested Matter in Probate Court
12:25pm	Questions and Answers	Questions and Answers

12:35pm	Networking Lunch on Premises
1:50pm	Legislative Update
2:30pm	Sunset of the Federal Estate Tax Exemption
3:30pm	Networking Break

	Trusts Track	Disability Planning Track
3:45pm	Allow Me to Reintroduce Myself: Valuable Trust Tools You May Not Be Using	Administering Estates with Estate Recovery Claims
4:30pm	Corporate Transparency Act Reporting: Status and Compliance Update	Determining Capacity
5:10pm	Questions and Answers	Questions and Answers

5:20pm	Networking Reception

ON-DEMAND SESSIONS (AVAILABLE 06/10/25)

- Charitable Distributions from Trusts and IRAs
- Medicaid, Elder Law, and Disability Update 2025
- Understanding and Using Purpose Trusts
- Estate Planning for the Farm-Owning Family
- How to Build Your Practice: Inheriting or Acquiring Another Lawyer's Practice
- Connelly and Business Succession Planning in 2025
- Building a High-Impact Team: Effective Hiring and Utilization of Legal Assistants and Paralegals
- Figuring Out Family Dynamics for Family Business Succession
- An Update on Billing Models 2025 and How to Charge Clients

***Novi:** You can receive 6.25 CLE/MCJE for attending all in-person sessions on 06/12/25. Your Novi registration also includes nine on-demand video sessions. Novi registrants will be emailed access on 06/10/24. You can receive 5.25 CLE/MCJE for watching all nine on-demand sessions, if you contact ICLE and provide the credit codes for each session watched.

To receive CLE from Ohio for on-demand sessions: ICLE must submit to Ohio on your behalf. After watching all the on-demand sessions, email ICLE at icle@umich.edu. Provide the credit codes from the videos.

***CTFA:** This event will be submitted to the ABA Professional Certifications for CTFA credit review and approval 90 days prior to the event. Total credit approved will be reflected on the ICLE website after approval.

[1]MP3 download available to all registrants after the seminar.

Tracks

Plenary Sessions

Acme/1:00pm/Thursday | Novi/8:30am/Thursday

Welcome Remarks and Announcements

Hear from the current president of the State Bar of Michigan as well as the chair of the Probate & Estate Planning Section.

Katie Lynwood, Buhl Little Lynwood & Harris PLC, *East Lansing;* Joseph P. McGill (Acme only), Foley Baron Metzger & Juip PLLC, *Livonia*

Acme/1:30pm/Thursday | Novi/2:30pm/Thursday

Sunset of the Federal Estate Tax Exemption

Understand the potential impact of a reduced exemption on clients' estate plans and tax liabilities (and potentially, impact of the election); strategies for clients to minimize estate and gift taxes, such as lifetime and charitable giving; the use of grantor trusts, family limited partnerships, and other sophisticated estate planning tools; how donees can "undo" taxable gifts through disclaimers if the law changes unexpectedly.

Edwin P. Morrow III, Kelleher + Holland LLC, *Dayton, OH*

Acme/2:30pm/Thursday | Novi/1:50pm/Thursday

Legislative Update

Howard H. Collens, Collens Estate Law, *Huntington Woods;* Nathan R. Piwowarski (Acme only), McCurdy Wotila & Porteous PC, *Cadillac*

Acme/6:00pm/Thursday | Novi/5:20pm/Thursday

Networking Reception

Relax and join faculty, sponsors, exhibitors, and fellow registrants for light hors d'oeuvres and cocktails.

Acme/8:10am/Friday

Remarks from the State Bar Executive Director

Hear from the executive director of the State Bar of Michigan.

Peter Cunningham, State Bar of Michigan, *Lansing*

Acme/8:30am/Friday | Novi/8:50am/Thursday

The Ultimate EPIC Q&A: 25 Years of Progress and Pain Points

Tracing the history of EPIC and the MTC and how we got here; common themes from lingering questions; live Q&A.

Mark K. Harder, Warner Norcross + Judd, *Holland;* Douglas A. Mielock, Foster Swift Collins & Smith PC, *Lansing;* Hon. David M. Murkowski, Chief Judge, Kent County Probate Court, *Grand Rapids*

Acme/12:00pm/Friday | Novi/12:35pm/Thursday

Networking Lunch on Premises (Preregistration Required for Acme—Limit 100)

Enjoy lunch with colleagues and share your thoughts on the institute's most thought-provoking topics.

Acme/8:30am/Saturday | Novi/9:50am/Thursday

Caselaw Update

David L. J. M. Skidmore, Warner Norcross + Judd LLP, *Grand Rapids*

Acme/9:15am/Saturday | Novi/On Demand/Available 06/10/25

Understanding and Using Purpose Trusts

Overview of well-publicized use of a purpose trust to own the voting shares of Patagonia in order to preserve the founder's mission of protecting the environment; alternative ownership for succession planning; cases in Europe; unique legal features and drafting challenges posed by purpose trusts.

Ellen K. Harrison, McDermott Will & Emery LLP, *Washington, DC*

Hot Topics Track

Acme/3:30pm/Thursday | Novi/10:50am/Thursday

SECURE Act: Where Are We Now?

Treasury regulations; separate account treatment; planning for eligible designated beneficiaries.

Amy N. Morrissey, Mitzel Law Group PLC, *Ann Arbor*

Tracks

Acme/4:15pm/Thursday | Novi/11:40am/Thursday

Uncapping: Top 10 Property Transfer Traps and How to Avoid Them

Nuances of transfers that trigger taxable value uncapping; leveraging exempt transactions; Homestead Property and Principal Residence Exemption; proper timing and structuring of transfers.

Melisa M. W. Mysliwiec, Fraser Trebilcock, *Grand Rapids*

Acme/5:00pm/Thursday | Novi/12:25pm/Thursday

Questions and Answers

Core Concepts Track

Acme/3:30pm/Thursday | Novi/10:50am/Thursday

The Alpha and Omega of Client Relations: Engagement and Exit Letters

Start off on the right foot with comprehensive engagement letters; modify existing engagement letters for limited purpose representations; step-by-step guide for ending engagements that aren't beneficial to either party (the lawyer and the client); tips for drafting strong closing letters that encourage future engagements.

Alexander S. Mallory, McCurdy Wotila & Porteous PC, *Cadillac*

Acme/4:15pm/Thursday | Novi/11:40am/Thursday

Anatomy of a Contested Matter in Probate Court

Prevalence of elder financial exploitation/need for lawyers; contested matters including ex parte motions to preserve the status quo (and forms); discovery principles (and forms); mediation (and forms); contested hearings.

Daniel S. Hilker, Chalgian & Tripp Law Offices PLLC, *East Lansing*

Acme/5:00pm/Thursday | Novi/12:25pm/Thursday

Questions and Answers

Trusts Track

Acme/9:45am/Friday | Novi/On Demand/Available 06/10/25

Charitable Distributions from Trusts and IRAs

Making IRAs payable to charitable trusts (but more flexibly); permitting trusts receiving inherited IRAs to eventually make more flexible distributions to charities and charitable trusts; how final SECURE Act regulations (and other trust administrative burdens) make naming charities and charitable trusts as potential appointees so much better than making them discretionary beneficiaries; when and how can you mix charities and IRAs in the same trust; why trusts receive better charitable deductions; special trust provisions you want for trusts receiving Roth accounts; common pitfalls to avoid.

Edwin P. Morrow III, Kelleher + Holland LLC, *Dayton, OH*

Acme/10:25am/Friday | Novi/4:30pm/Thursday

Corporate Transparency Act Reporting: Status and Compliance Update

The CTA and its implications for businesses and trustees; insights from three critical perspectives (corporate/business, estate planning/corporate trustees, and LARA); compliance challenges; clarifying who is required to report and evolving responsibilities; effective compliance strategies for trustees; practical tips to ensure ongoing adherence to reporting requirements.

Mark R. High, Dickinson Wright PLLC, *Detroit;* Alexis Lupo (Novi only), Michigan LARA Corporations Securities and Commercial Licensing Bureau, *Lansing*; Raj A. Malviya, Miller Johnson, *Grand Rapids*

Acme/11:05am/Friday | Novi/3:45pm/Thursday

Allow Me to Reintroduce Myself: Valuable Trust Tools You May Not Be Using

Adapting to changing times, people, and circumstances when a trust becomes irrevocable; provisions you may not be using that will add flexibility to your planning; the use of trust protectors, directed trusts, divided trusteeships; dealing with trustee vacancies, discretionary distribution provisions, decanting, special powers of appointment, optional special needs trust provisions, and more.

Kathleen A. Cieslik, Varnum LLP, *Birmingham*

Acme/11:45am/Friday

Questions and Answers

Disability Planning Track

Acme/9:45am/Friday | Novi/On Demand/Available 06/10/25

Medicaid, Elder Law, and Disability Update 2025

Michigan and federal developments; updated and effective planning techniques; special needs strategies.

Kathleen Hogan Aguilar, Rhoades McKee PC, *Grand Rapids*

Acme/10:25am/Friday | Novi/3:45pm/Thursday

Administering Estates with Estate Recovery Claims

Planning ahead to avoid estate recovery; when does it not apply; providing notice when estate recovery is at play; how to play by the rules; what to expect when working with the department.

Rosemary H. Buhl, Buhl Little Lynwood & Harris PLC, *East Lansing*

Acme/11:05am/Friday | Novi/4:30pm/Thursday

Determining Capacity

Review the legal criteria for determining mental competency; common signs of diminished competency; recognizing susceptibility to undue influence; working with health care providers to obtain medical evaluations and expert opinions when competency is in question.

Peter A. Lichtenberg, PhD, Wayne State University Institute of Gerontology, *Detroit;* Sanford J. Mall, Mall Malisow & Cooney PC, *Farmington Hills*

Acme/11:45am/Friday | Novi/5:10pm/Thursday

Questions and Answers

Special Advanced Session

Acme/1:30pm/Friday

Now and Then—Conditionalizing on Future Contingents as a Measure of Freedom in Exercising Powers of Appointment

Relation back theory: resulting trusts, perpetuities, and choice of law; second look doctrine; looking both ways when appointing outright; same when appointing in further trust.

James P. Spica, Chalgian & Tripp Law Offices, *Southfield*

Special Basic Session

Acme/1:30pm/Friday

New Lawyers, You Have the Floor

Ask your practice management and substantive questions in this open forum.

Alex J. Meyers, Meyers Estate Planning Solutions PLLC, *Farmington Hills;* Katherine M. Szymanski, Varnum LLP, *Grand Rapids*

Business Planning Track

Acme/10:30am/Saturday | Novi/On Demand/Available 06/10/25

Estate Planning for the Farm-Owning Family

Unique aspects of farm assets like land, equipment, livestock, and best practices for asset titling and transfer; succession planning tailored to farm-owning families; benefits of the Michigan Qualified Agricultural Property Exemption and federal estate tax reliefs like the Special Use Valuation.

Warren H. Krueger III, Foster Swift Collins & Smith PC, *Lansing*

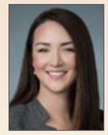
Acme/11:00am/Saturday | Novi/On Demand/Available 06/10/25

Connelly and Business Succession Planning in 2025

The impact on closely held business owners; review current buy-sell agreements and consider whether to restructure ownership of life insurance; cross-purchase

Moderators

Disability Planning Track
Rosemary H. Buhl
Buhl Little Lynwood & Harris PLC, *East Lansing*



Trusts Track
Kathleen A. Cieslik
Varnum LLP, *Birmingham*

Business Planning Track
Warren H. Krueger III
Foster Swift Collins & Smith PC, *Lansing*

Core Concepts Track
Alexander S. Mallory
McCurdy Wotila & Porteous PC, *Cadillac*

Plenary Session
Richard C. Mills
Smith Haughey Rice & Roegge, *Ann Arbor*

Hot Topics Track
Amy N. Morrissey
Mitzel Law Group PLC, *Ann Arbor*

LPM Track
Joan C. Skrzyniarz
Dickinson Wright PLLC, *Troy*

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Tracks

agreements, special purpose LLCs, and insurance trusts as options for owning life insurance needed to buyout a deceased shareholder.

Jennifer L. Remondino, Warner Norcross + Judd, *Grand Rapids*

Acme/11:30am/Saturday | Novi/On Demand/Available 06/10/25

Figuring Out Family Dynamics for Family Business Succession

Identifying "family dynamics" and their defining characteristics; the importance of understanding the family dynamics of your family business clients; using the family dynamics of your clients to advise them through a successful succession process.

P. Haans Mulder, Cunningham Dalman PC, *Holland*

Acme/12:00pm/Saturday

Questions and Answers

LPM Track

Acme/10:30am/Saturday | Novi/On Demand/Available 06/10/25

How to Build Your Practice: Inheriting or Acquiring Another Lawyer's Practice

Considerations and checklists for inheriting or acquiring clients from other lawyers, including purchasing/merging existing outside practices, internal partnership transitions, and retirements; strategies for maintaining and growing the client base during the transition; structuring fees; Michigan-specific regulatory and ethical guidelines when inheriting or expanding a legal practice.

Joan C. Skrzyniarz, Dickinson Wright PLLC, *Troy*

Acme/11:00am/Saturday | Novi/On Demand/Available 06/10/25

Building a High-Impact Team: Effective Hiring and Utilization of Legal Assistants and Paralegals

Strategic hiring practices for finding the right fit; effective delegation and workflow management; professional development and retention.

Sarah L. Ostahowski, Sarah's Law Firm PLC, *Clare*

Acme/11:30am/Saturday | Novi/On Demand/Available 06/10/25

An Update on Billing Models 2025 and How to Charge Clients

Effective strategies for discussing billing options with clients; setting clear expectations; overview of modern billing structures such as flat fees, value-based billing, subscription services, and hybrid models combining hourly and flat rates; charging for consultations; streamlining billing processes; ethical considerations.

Raymond A. Harris, Buhl Little Lynwood & Harris PLC, *East Lansing*

Acme/12:00pm/Saturday | Novi/5:10pm/Thursday

Questions and Answers

"The annual institute is always stimulating. I always get a new way of looking at issues."

-J. David Kerr, Kerr Law Firm PLLC, *Mount Pleasant*

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IN-PERSON ADD-ON SEMINAR | ACME ONLY

Better Clients and Bigger Cash Flow: An Estate Planning Boot Camp

05/14/25, 1:00pm-5:00pm

Cosponsored by the Probate & Estate Planning Section of the State Bar of Michigan

Create the Ultimate Business Plan for Your Practice

Join us a day early and get advice from peers who know how to run a successful practice. In this perfect companion to the *Probate & Estate Planning Institute,* experienced Michigan estate planning lawyer Terrence Quinn and financial expert Jayden Doye give you personal instruction and concrete steps you can implement immediately.

This interactive workshop helps you identify your ideal clients and gain more of them—while also generating business from existing clients. Set goals, run the numbers, and charge what you're worth. Ideal for newer lawyers and solo/small firm practitioners looking for a fresh approach to the business side of things.

You will be able to:

- Attract your ideal clients through marketing, social media, and more
- Generate business from your existing clients
- Understand the current market and price your services accordingly
- Set and meet business goals, such as how many trusts you need to make your monthly net
- Discuss strategies with peers and walk away with annual goals

Speakers

Terrence G. Quinn
The TGQ Law Firm, *Ann Arbor*

T. Jayden Doye
Prestige Accounting & Consulting, *Atlanta, GA*

Probate & Estate Planning Institute Registrants

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65TH ANNUAL

Probate & Estate Planning Institute

MAY 15–17, 2025
Grand Traverse Resort & Spa, Acme

JUNE 12, 2025
Suburban Collection Showplace, Novi

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B. Institute Registration | Pick One

☐ **Acme,** 05/15-17/25 ☐ **Novi,** 06/12/25

☐ **$445** General

☐ **$415** Cosponsor Section Member

☐ **$395** ICLE Partner

☐ **$195** New Lawyer (Not yet reached 4th anniversary date of MI Bar admission)

☐ **$345** per Registrant (4+ Registrants from the Same Firm)[1]

☐ **FREE** Judges (Limit 40)[2]

25CI-6530

C. Add-On Seminar Registration | Optional

Better Clients and Bigger Cash Flow: An Estate Planning Boot Camp
Acme, 05/14/25, 2:00pm-5:00pm

☐ **$195** Probate & Estate Planning Institute Registrant

25CI-6561

D. Networking Events—Acme | Optional

Space is limited; preregistration required.

☐ **FREE** Institute Networking Lunch, 05/16/25, 12:00pm-1:15pm

☐ **$25 Institute Registrant** Microbrewery Tour, 05/17/25, 12:45pm-5:15pm

☐ **$25 Each Additional Guest** Microbrewery Tour, 05/17/25, 12:45pm-5:15pm

E. Materials Format for Institute Registrants

☐ **FREE** Electronic Materials

☐ **$45** Print Handbook[3] and Electronic Materials | Probate & Estate Planning Institute

F. Can't Attend the Institute? | Pick One

Non-Registrants, Probate & Estate Planning Institute—Purchase the Electronic Materials

☐ **$225** Non-ICLE Partners

☐ **$157.50** ICLE Partners

G. Payment Info

Institute Registration (Box B)	$________
Add-On Seminar Registration—Acme (Box C)	$________
Microbrewery Tour—Acme (Box D)	$________
Print Handbook—Probate & Estate Planning Institute Registrants (Box E)	$________
Institute Materials for Non-Registrants—Probate & Estate Planning Institute (Box F) *(Add 6% MI Sales Tax to This Line Only)*	$________
Total Amount Due	$________

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