

# Seminar Agenda

## Collecting Information and Beginning the Probate Process

Conducting the initial client interview  
Obtaining the will or the family tree  
Collecting information on assets and debts  
Determining what type of probate to file  
Filing the petition, schedules and inventory  
Naming the personal representative  
Obtaining the tax ID number

*R. Wilkes*

## Handling Creditors' Claims and Tax Issues

Managing creditors' claims

- Preparing public notice
- Classifying debts
- Disputing creditors' claims

Handling tax reporting obligations

- Decedent's final income tax returns
- Fiduciary income tax return
- Inheritance tax reporting

*R. Wilkes,  
S. Johnson*

## Managing and Distributing Estate Assets and Closing the Estate

Collecting assets  
Setting up the estate's checking account  
Valuing assets  
Preserving, liquidating and distributing assets  
Preparing the final account  
Making distributions, obtaining releases  
Wrapping up loose ends

*C. Knopke*

## Handling Ethical Issues in Probate

Identifying your client  
Defining the scope of representation  
Avoiding conflicts of interest  
Working with elderly clients  
Understanding fiduciary duty

*S. Johnson*

**Kansas Probate and Estate Administration**  
Overland Park, KS - Wednesday, August 19, 2015

## Learning Objectives

### *You'll be able to:*

**Conduct** initial client interviews and prepare petitions and inventories.

**Identify** key considerations in naming personal representatives.

**Prepare** public notices, classify debts and dispute creditors' claims.

**Understand** how to preserve, liquidate and distribute assets.

**Handle** tax reporting obligations.

**Avoid** conflicts of interest and recognize important aspects of working with elderly clients.

# Kansas Probate and Estate Administration



**Overland Park, KS**  
Wednesday, August 19, 2015

**Understand** how to collect the appropriate information and start the probate process

**Manage** creditors' claims and tax issues

**Prepare** inventories and final accounts

**Learn** about distributing estate assets and closing estates

**Explore** ethical issues in estate administration that you need to be aware of

### Continuing Education Credit

*Accountants*  
7.0 CPE Hours

*Attorneys*  
Kansas: 7.0 CLE Hours  
(1.0 Ethics)  
Missouri: 7.2 CLE Hours  
(1.2 Ethics)



# Faculty

## Roberta L. Wilkes *Partner, Wilkes & Dunn*

Ms. Wilkes focuses her practice on estate planning, including the drafting of wills and trusts and the handling of probate estates. She also counsels clients and drafts documents relating to both real estate and small business matters. Her practice includes the formation of corporations, limited liability companies and partnerships. She represents parties to foreclosure actions. She is experienced in the field of nonprofit organizations and has led groups through the Internal Revenue Service process of obtaining charitable exempt status. She earned her J.D. degree from the University of Missouri at Kansas City.

## Stephen M. Johnson *Johnson Law KC LLC*

Mr. Johnson is an experienced attorney who serves clients' needs in estate planning, probate, and fiduciary litigation; adoption; real estate; small business law; copyrights and trademarks; and nonprofits and tax exempt organizations. He is a member of the Kansas City Metropolitan Bar Association, the Johnson County Bar Association, the Kansas Bar Association, the Missouri Bar Association, and the Kansas City Estate Planning Society. He is licensed to practice law in Kansas and Missouri's state and federal courts. Mr. Johnson is the co-author of seven published CLE articles on Kansas estate and trust law, and Kansas and Missouri nonprofits, among other topics. A passionate writer, Mr. Johnson is a member of *The Kansas City Star's* Midwest Voices column team and has written over a dozen guest opinion columns. He earned his J.D. degree from the University of Kansas School of Law.

## Christina Knopke *Attorney, Gaughan & Connealy*

Ms. Knopke focuses her practice on estate planning, wills and trusts, probate administration and trust administration. She is licensed to practice in both Kansas and Missouri and is a member of the Kansas City Metropolitan Bar Association and the Association of Women Lawyers, as well as the individual Kansas and Missouri Bar Associations. Ms. Knopke earned her J.D. degree from the University of Missouri-Kansas City School of Law and her undergraduate degree from the University of Arizona.

# About the Seminar

Holiday Inn Hotel & Suites  
8787 Reeder Road  
Overland Park, KS 66214  
(913) 888-8440

## Tuition

**\$299** for individual registration  
**\$279** for two or more simultaneous registrations. Each registration includes one copy of *Kansas Probate and Estate Administration*.

**Receive a reduced tuition rate of \$101** by registering to be our on-site coordinator for the day. For availability and a job description, go online to [www.foxmoor-ce.org](http://www.foxmoor-ce.org).

## Four Easy Ways to Register Today!

Register online at [www.foxmoor-ce.org](http://www.foxmoor-ce.org), mail in registration form to **Foxmoor Continuing Education, PO Box 278, Altoona, WI 54720-0278**, fax the form to (715) 835-6066, or call a customer service representative at (715) 835-5900.

**Cancellations:** Cancel at least 48 hours before the start of the seminar, and receive a full tuition refund, minus a \$39 service charge for each registrant. Cancellations within 48 hours will receive a credit toward another seminar or the CD/manual package. You may also send another person to take your place.

Registration  
8:00 - 8:30 am  
Morning Session  
8:30 - 11:45 am  
Lunch (On your own)  
11:45 am - 1:00 pm  
Afternoon Session  
1:00 - 4:15 pm

## Continuing Education Credit Information

This group live, intermediate-level program offers accountants 7.0 intermediate-level CPE credit hours in the area of specialized knowledge and applications. A basic understanding of probate and estate administration is recommended, and no advance preparation is required to attend this event.

Foxmoor Continuing Education, a division of HalfMoon Education Inc. 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 submitted to the National Registry of CPE Sponsors through its website: [www.learningmarket.org](http://www.learningmarket.org). Sponsor No. 103015.

This seminar has been approved for 7.0 CLE hours, including 1.0 ethics hour, for Kansas attorneys and 7.2 CLE hours, including 1.2 ethics hour, for Missouri attorneys.

Attendance will be monitored and reported as required. Attendance certificates will be available after the seminar for most individuals who complete the entire event. Attendance certificates not available at the seminar will be mailed to participants within fifteen business days.

## Why Attend a Live Seminar?

- Live seminars offer huge potential for networking opportunities.
- You can share ideas and hear different viewpoints from other like-minded individuals in your field.
- You are engaged in your learning experience as you interact face-to-face with our expert faculty.
- Instructors respond personally to your questions and concerns.

## CD Manual Package

**An audio recording of this seminar is available for \$199 (including shipping).**

Allow five weeks from the seminar date for delivery. Please refer to specific state licensing rules or certification requirements to determine if this learning method is eligible for continuing education credit.

# Registration

## Kansas Probate and Estate Administration

Overland Park, KS - Wednesday, August 19, 2015

### How to Register

#### Online:

[www.foxmoor-ce.org](http://www.foxmoor-ce.org)

#### Phone:

715-835-5900

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Key Code

#### Mail:

HalfMoon Education Inc.,  
PO Box 278, Altoona, WI  
54720-0278

#### Complete the entire form.

Attach duplicates if necessary.

### Registrant Information

Name: \_\_\_\_\_

Company/Firm: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Occupation: \_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

#### Additional Registrants:

Name: \_\_\_\_\_

Occupation: \_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

Name: \_\_\_\_\_

Occupation: \_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

Email address is required for credit card receipt, program changes, and notification of upcoming seminars and products. Your email will not be sold or transferred.

( )  I need special accommodations. Please contact me.

## Tuition

( ) **I will be attending the live seminar.** Single Registrant - **\$299.00**. Two or more registrants from the same company registering at the same time - **\$279.00** each.

( ) **I am not attending.** Please send me the CD manual package for **\$199.00**. (S&H included. Please allow five weeks from seminar date for delivery)

**Checks:** Make payable to HalfMoon Education Inc.

**Credit Card:** *Mastercard, Visa, American Express, or Discover*

Credit Card Number: \_\_\_\_\_

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