# Estate Administration From Start to Finish

» *A Comprehensive, Step-By-Step Guide to the Estate Administration Process*

**Oklahoma City, Oklahoma** — June 13, 2017
**Tulsa, Oklahoma** — June 16, 2017

**Presented By**

Sandra J. Alexander
Tyler R. Barrett
James W. Carlton Jr.
Cory B. Hicks
Catherine W. Hoopert
Terrell Monks
Joseph R. Wells

**Credit Information**

CLE - 8.0 incl. 1.0 ethics
Financial Planners - 8.0
IACET - 0.7
CPE for Accountants/NASBA - 8.0 incl. 1.0 ethics
PACE - 8.0
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# SEMINAR OUTLINE

**I. COMMENCEMENT OF PROCEEDINGS AND INFORMATION GATHERING**
*8:30 - 9:30, Written by Cory B. Hicks. Presented by Cory B. Hicks in Oklahoma City and Joseph R. Wells in Tulsa.*
- A. Appointment of Estate Administration
  1. Formal vs. Informal Proceedings
  2. Sample Letters of Authority
- B. First Meeting with Family or Designated Personal Representative and Determination of Heirs
- C. Written Fee Agreements
- D. Tips to Locate Information Quickly Using Online and Government Resources
- E. Dealing with Multiple States

**II. INITIAL STEPS TO THE ESTATE ADMINISTRATION PROCESS**
*9:30 - 10:15, Written by Cory B. Hicks. Presented by Cory B. Hicks in Oklahoma City and Joseph R. Wells in Tulsa.*
- A. Understanding the Laws of Intestacy
- B. Sample Estate Administration Checklists, Forms and Required Notices Needed
- C. Interpreting Provisions and Terms of Art Found in Wills
- D. Using Disclaimers Correctly

**III. MARSHALLING ASSETS**
*10:30 - 11:00, Written by Tyler R. Barrett. Presented by Tyler R. Barrett in Oklahoma City and Catherine W. Hoopert in Tulsa.*
- A. Procedures to Locating and Marshalling Probate and Non-Probate Assets
  1. Safe Deposit Boxes and Bank Accounts
  2. Real Estate
  3. Brokerage Accounts, 401Ks, IRAs, Pensions and Life Insurance Policies
- B. Sample Forms and Documents Needed
- C. Appraisers and Valuing the Property of Probate Estates

**IV. HANDLING CREDITOR CLAIMS AND DEBT**
*11:00 - 12:00, Written by Tyler R. Barrett. Presented by Tyler R. Barrett in Oklahoma City and Catherine W. Hoopert in Tulsa.*
- A. Sample Forms and Required Notices Needed
- B. Priority and Payment of Claims
- C. Late Claims and Contested Claims
- D. Steps to Ensure all Debt is Located and Handled Correctly
  1. What if the Assets Don't Cover the Bills?
  2. Bankruptcy and Foreclosure
- E. Selling of Assets and Properly Dealing with Creditors

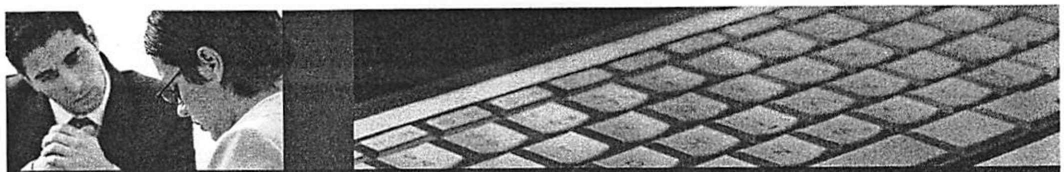
*If needed, the above agenda may be changed to best accommodate all of our attendees.

**V. COMPLEX ISSUES IN ESTATE ADMINISTRATION**
*1:00 - 1:45, Written by Sandra J. Alexander. Presented by Terrell Monks in Oklahoma City and Sandra J. Alexander in Tulsa.*
- A. Jointly Held Assets
- B. Spousal Claims
  1. Allowances and Elections Against the Will
- C. Handling Unmarried Couples and Stepchildren
- D. Will Contests, Trust and Estate Disputes
- E. Business Ownership
- F. Agency Problems Involving Guardianships, Conservatorships, Powers of Attorney or Other Agency Relationships

**VI. HANDLING ESTATE ADMINISTRATION TAX ISSUES**
*1:45 - 2:45, Written by Sandra J. Alexander. Presented by Terrell Monks in Oklahoma City and Sandra J. Alexander in Tulsa.*
- A. Examples of Forms Needed
- B. Federal and State Estate Tax Considerations
- C. Income Tax Issues for the Estate and the Heirs
- D. Resolving Disputes with Taxing Authorities
- E. Deductions and Exemptions
- F. How the Generation-Skipping Transfer Tax Affects Your Clients
- G. Tax Deadlines and Handling Extensions
- H. Sales of Real Property

**VII. DISTRIBUTION AND CLOSING OF THE ESTATE**
*3:00 - 3:40, Written by James W. Carlton Jr. Presented by James W. Carlton Jr. in Oklahoma City and Sandra J. Alexander in Tulsa.*
- A. Sample Forms, Agreements and Documents Needed
- B. Proper Transferring and Distribution of Probate and Non-Probate Assets and Timing of Distributions
  1. Real Estate
  2. 401Ks, IRAs, Pensions and Life Insurance Policies
  3. Distribution of Miscellaneous Assets (Automobiles, Jewelry, Etc.)
- C. Distributions in Kind
- D. Distribution to Minors, Surviving Spouse and Trusts
- E. Disposition of Unclaimed Assets
- F. Proper Settlement of the Estate
  1. Formal and Informal Estate Accountings
  2. Choosing the Appropriate Closing Procedure
  3. Compensation and Discharge of the Personal Representative

**VIII. ETHICS AND ESTATE ADMINISTRATION**
*3:40 - 4:40, Written by James W. Carlton Jr. Presented by James W. Carlton Jr. in Oklahoma City and Sandra J. Alexander in Tulsa.*
- A. Breach of Fiduciary Responsibility
- B. Avoiding Conflicts of Interest
- C. Attorney-Client Privilege
- D. Fee Agreements



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June 13 - Oklahoma City

**TYLER R. BARRETT** is a solo practitioner at The Law Office of Tyler R. Barrett, P.L.L.C, where he practices in estate planning, probate and elder law. He is admitted to practice in the State of Oklahoma. Mr. Barrett is a member of the Oklahoma Bar Association (Estate Planning, Probate and Trust Sections), the Cleveland County Bar Association, WealthCounsel, and the National Academy of Elder Law Attorneys, Inc.

**JAMES W. CARLTON JR.** is a partner in the law firm of Garvin, Agee & Carlton, P.C., where he has been practicing law since 1988 in the areas of real estate, probate, estate administration, taxation, municipal and elder law. He is a certified public accountant in Oklahoma and has served as municipal counsel for the cities of Pauls Valley, Davis and Paoli. Mr. Carlton has spoken for various professional groups on estate planning, probate and elder law issues.

**CORY B. HICKS** is an attorney with Field & Hicks PLLC in Guymon, where he practices primarily in the areas of probate, real estate, estate planning and business law. He routinely reviews abstracts and issues title opinions for lenders, title insurers and buyers, as well as performing searches in county land records. Mr. Hicks has been published in the *Oklahoma Law Review* and the *Oklahoma Bar Journal*. He was named a Rising Star in Oklahoma by *Super Lawyers* magazine.

**TERRELL MONKS** practices primarily in Oklahoma County and Cleveland County, where his practice focuses on probate, estate planning, and guardianships. Mr. Monks represents the cities of Bethany and Piedmont, and he has served them for more than 20 years. Mr. Monks is active in public service. He has tried more than 100 cases to verdict, but actively advocates mediation and alternative dispute resolution. Mr. Monks contributes articles to the *Oklahoma Bar Journal*.

June 16 - Tulsa

**SANDRA J. ALEXANDER** is a sole prac
is concentrated in the areas of real esta
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served on the Board of Trustees at the I
Oklahoma (a not-for-profit entity) for 1.
the immediate past chairman of the Ac
Center (a for-profit entity), having com
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**JOSEPH R. WELLS** is an attorney in pr
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before deciding to attend law school. /
his practice began in general civil litiga
as well as family law.

*Detailed biographies can be found on ou*



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**Registration** 8:00 — 8:30 am
**Seminar** 8:30 am — 4:40 pm

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June 16 - Tulsa

**SANDRA J. ALEXANDER** is a sole practitioner in Tulsa, where her practice is concentrated in the areas of real estate, small and medium businesses, wills, estates, trusts, probate and legal services for the elderly. Ms. Alexander served on the Board of Trustees at the Hillcrest Medical Center in Tulsa, Oklahoma (a not-for-profit entity) for 12 years, and is currently serving as the immediate past chairman of the Advisory Board of Hillcrest Medical Center (a for-profit entity), having completed 8 years as chairman. She was an instructor in business law and legal implications of the insurance industry for Tulsa Junior College and an adjunct professor of law, teaching real estate transactions at the University of Tulsa College of Law.

**CATHERINE W. HOOPERT** is an Oklahoma-based attorney, with Catherine W. Hoopert, PLLC, where she practices in the areas of estate planning, wills, trusts, probate, administration and taxation. She maintains her CPA credentials, is a member of the American Bar Association, Oklahoma Bar Association, Tulsa County Bar Association and Oklahoma Society of CPAs. Ms. Hoopert is admitted to practice before all state courts of Oklahoma, the Northern District of Oklahoma U.S. District Court, and the U.S. Tax Court.

**JOSEPH R. WELLS** is an attorney in private practice in Tulsa with Wells Law, PLLC. He graduated from Oklahoma State University with a B.S. degree in mathematics. After graduating, he worked as a stock analyst in New York City before deciding to attend law school. After completing his legal education, his practice began in general civil litigation, probate and estate planning, as well as family law.

*Detailed biographies can be found on our website at www.nbi-sems.com.*

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ears, and is currently serving as
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rofessor of law, teaching real estate
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na-based attorney, with Catherine
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Bar Association, Oklahoma Bar
and Oklahoma Society of CPAs.
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istrict Court, and the U.S. Tax Court.

ate practice in Tulsa with Wells Law,
University with a B.S. degree in
d as a stock analyst in New York City
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# SEMINAR OVERVIEW

## A Step-By-Step Guide to Estate Administration

Designed for attorneys who are new to estate administration or need a basic refresher, this course will provide you with a comprehensive overview of estate administration, including proper asset valuation and distribution, taxation, and account closing procedures. You'll also learn how to correctly deal with thorny estate administration debt issues, including jointly held assets, business ownership and complex tax issues. Equip yourself with real-life, practical knowledge to ensure you are fully prepared to handle the entire estate administration process from start to finish - ***register today!***

- Learn how to meet every deadline, follow procedures and complete essential forms.
- Identify key estate administration pitfalls you need to avoid.
- Acquire strategies to ensure you can help your clients through every step of the probate process.
- Manage your client's entire estate administration procedures properly and effectively.
- Learn how to tackle complex estate administration issues such as tax issues, jointly held assets and will contests.
- Understand how to properly transfer and distribute assets.
- Explore proper procedures and processes when dealing with insurance claims and debt during estate administration.
- Gain a better understanding of the probate court's procedures so that you can avoid common pitfalls and mistakes.
- Get the latest information on allowances and elections against the will.
- Identify how to properly distribute assets to minors, surviving spouses and trusts.

## WHO SHOULD ATTEND

This **basic-to-intermediate level seminar** is designed for professionals who want to be more effective in the estate administration process, such as:

- Attorneys
- CPAs and Accountants
- Tax Planning Specialists
- Tax Preparers
- Paralegals
- Financial Planners and Wealth Managers
- Trust Officers

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