Colorado Bar Association CLE | The nonprofit educational arm of the Colorado and Denver Bar Associations

CBA-CLE books in action

ORANGE BOOK FORMS

Colorado Estate Planning Forms

PRACTITIONERS WHO OWN *ORANGE BOOK FORMS* FIND IT INVALUABLE –

"Gotta Have It"

"Absolutely Necessary if You Write Even One Will"

"Great Forms"

"Invaluable for Those with Basic Estate Planning Practice"

"Must-Have for Estate Planners"

"Reasonable Cost for Great Expertise and Content"

"Wonderful Starting Point for Estate Planning"

CLASS MATERIALS:
Orange Book Forms: Colorado Estate Planning Forms,
8th Edition

NEW!
The entire book was redesigned to be more user-friendly!

Live Program & Live Webcast: **Friday, December 8, 2017**

Live program at the **CBA-CLE Classroom** • 1900 Grant Street, Suite 300, Denver, CO

Submitted for 7 General CLE Credits

Video Replays: **January 3, 2018** • Denver, Colorado Springs, and Grand Junction

REGISTER FOR THIS PROGRAM ONLINE! Go to www.cba-cle.org

ORANGE BOOK FORMS

Colorado Estate Planning Forms

In the 1970s, a group of estate planning attorneys compiled several frequently-used forms into what was then called *The Orange Book*. This book has evolved through the years, and is now the go-to book for Trust & Estate attorneys in Colorado. The Eighth Edition of *Orange Book Forms* contains the most dramatic evolution yet: **the entire book was redesigned in order to be more user-friendly!**

You will receive a copy of the brand new edition of Orange Book Forms, formally known as ***Orange Book Forms: Colorado Estate Planning Forms,*** Eighth Edition. This full-day program will go through the new Eighth Edition of *Orange Book Forms,* cover-to-cover. Members of the CBA Trust & Estate Section's Orange Book Forms Committee will discuss the various forms and how you can use them in your day-to-day practice. The day will close with a panel discussion by committee members giving practical tips as to how they use the book in their practices. Don't miss this informative program!

REGISTER TODAY!

PROGRAM AGENDA

8:30 AM	Registration and Continental Breakfast
9:00 AM	Introductions *Presented by* ***Peggy Gardner, Esq.***
9:05 AM	**Then and Now: History of *Orange Book Forms* and Looking Forward** *Presented by* ***Frank Hill, Esq.*** The Orange Book was developed in the 1970s as a sheaf of forms commonly used in the estate planning practice. Through the years, it has evolved into a full treatise with forms for many estate planning situations. The book has never been reformatted – until now. Learn about how the design of the book will help attorneys learn from the moment they open the cover.
9:55 AM	**Getting Started: Client Questionnaires, Initial Intake, and Engagement Letters** *Presented by* ***Barb Cashman, Esq.****, and* ***Kate Boland, Esq.*** Each estate plan is different, and the entire estate plan can change based on information learned in the first contacts with the client. Learn about tools for designing client-based estate plans.
10:45 AM	Networking Break

11:00 AM	**Drafting for the Client's Goals** *Presented by* ***Peggy Gardner, Esq.*** Choosing the appropriate will or trust for the client's situation is at the heart of estate planning. Learn how to choose the appropriate tool for the client's unique circumstances.
11:50 AM	Lunch (On Your Own)
1:00 PM	**Ancillary Documents: Powers of Attorney, Pourover Wills, and More** *Presented by* ***Elizabeth Meck, Esq.*** Wills and trusts are the "meat" of an estate plan, but ancillary documents are vital to ensuring the client's wishes are carried out. Learn about both financial and medical powers of attorney, pourover wills, documents to protect minor children and protected persons, and more.
1:45 PM	**Trust Funding** *Presented by* ***Bette Heller, Esq.*** An unfunded trust can leave an estate plan incomplete. Learn how to use ancillary documents to fund your client's trust, and how to approach the issue of trust funding with your client.
2:15 PM	**Gifting** *Presented by* ***Susan Boothby, Esq.*** Gifting is an important element to many estate plans. Learn how to utilize special powers of attorney and other tools to achieve your client's gifting goals.
2:45 PM	Networking Break
3:00 PM	**Planning for Specific Assets** *Presented by* ***Gordon Williams, Esq.*** Oil and gas interests, farms and ranches, S corporations, and qualified domestic relations trusts all require special drafting techniques. Learn how to draft for special situations not encountered in every estate plan.
3:30 PM	**Panel: Top Tips and Tricks for Using *Orange Book Forms*** *Moderated by* ***Peggy Gardner, Esq.*** *Panelists:* ***Alison Leary, Esq., M. Anthony Vaida, Esq., Lisa Willcox, Esq.,*** *and* ***Heidi Gassman, Esq.*** *Orange Book Forms* is a staple for the estate planning attorney's library. Learn how attorneys from various backgrounds and with varied practice experience use *Orange Book Forms* in their day-to-day practice.
4:15 PM	Adjourn

Live Program & Live Webcast: **Friday, December 8, 2017**

Live program at the **CBA-CLE Classroom** • 1900 Grant Street, Suite 300, Denver, CO

Submitted for 7 General CLE Credits

Video Replays: **January 3, 2018** • Denver, Colorado Springs, and Grand Junction

REGISTER FOR THIS PROGRAM ONLINE! Go to www.cba-cle.org

FACULTY

PROGRAM CHAIR:
Peggy Gardner, Esq.
Holland & Hart

FACULTY:
Kate Boland, Esq.
Boland Law & Mediation, LLC

Susan Boothby, Esq.
Hutchinson, Black & Cook, LLC

Barbara Cashman, Esq.
Barbara Cashman LLC

Heidi Gassman, Esq.
Wade, Ash, Woods, Hill & Farley, P.C.

Bette Heller, Esq.
Bette Heller PC

Frank Hill, Esq.
Frank Hill, Attorney at Law

Alison Leary, Esq.
Leary Law, LLC

Elizabeth Meck, Esq.
The Northern Trust Company

M. Anthony Vaida, Esq.
M. Anthony Vaida, Esq., PC

Lisa Willcox, Esq.
Hutchinson, Black & Cook, LLC

Gordon Williams, Esq.
Gordon W. Williams, Attorney at Law

ABOUT THE BOOK

CBA-CLE books in action

Orange Book Forms: Colorado Estate Planning Forms, 8th Edition

SUMMARY TABLE OF CONTENTS

ORANGE BOOK FORMS: COLORADO ESTATE PLANNING FORMS

Register by PHONE
when using VISA, MC or AmEx
In Denver: (303) 860-0608
Toll-Free: (888) 860-2531

Or FAX form to
when using VISA, MC or AmEx
FAX to: (303) 860-0624

Or MAIL form to
CBA-CLE
1900 Grant St, Suite 300
Denver, CO 80203-4303

Or Register ONLINE
when using VISA, MC or AmEx
Go to www.cba-cle.org

PROGRAM ORDER FORM

STEP 1 - REGISTRATION TYPE: *(Select live program, live webcast, or video replay)*

❏ **Live Program: December 8, 2017** - CBA-CLE Classroom, 1900 Grant St., Suite 300, Denver, CO (PR120817L)
❏ **Live Webcast*: December 8, 2017** - Must have access to high-speed internet (PR120817W)
* **Webcast participants:** You must register by November 22, 2017, in order to receive the book ***Orange Book Forms: Colorado Estate Planning Forms***, 8th Edition, in print before the start of class. After November 22, rush orders may require additional shipping fees.
❏ **Video Replay: January 3, 2018** - Please indicate video replay location:
❏ **Denver:** CBA-CLE Classroom, 1900 Grant Street, Suite 300 (PR120817V)
❏ **Colorado Springs:** 421 S. Tejon Street, Suite 100 (PR120817VCS)
❏ **Grand Junction:** 1250 E. Sherwood Drive (PR120817VGJ)

STEP 2 - REGISTRATION CATEGORIES:

❏ Non-member: $638
❏ New Lawyer Edge Partner: $299
❏ CLE Basic Pass Holder w/Printed Book: $259
❏ CBA Member: $598
❏ CLE Elite Pass Holder w/Printed Book: ...$259

PROGRAM ORDER FORM TOTAL $ ____________

HOMESTUDY / BOOK ORDER FORM

To receive CLE credit, you must purchase a Homestudy program format. Each Video On Demand and MP3 Homestudy includes an electronic PDF copy of the CBA-CLE book ***Orange Book Forms: Colorado Estate Planning Forms***, 8th Edition.

STEP 1 - REGISTRATION CATEGORIES AND HOMESTUDY FORMAT:

	Printed Book & Recorded Homestudy On Audio CD:	Video-On-Demand (PDF of book):	MP3 Audio Download (PDF of book)
❏ CBA Member Homestudy:	❏ $598	❏ $588	❏ $588
❏ Non-member Homestudy:	❏ $638	❏ $628	❏ $628
❏ New Lawyer Edge Homestudy:	❏ $299	❏ $294	❏ $294
❏ Elite or Basic CLE Pass Holders Homestudy*:		❏ $259	❏ $259

*The e-PDF Book will be uploaded to your dashboard

STEP 2 - BOOK ONLY: ***Orange Book Forms: Colorado Estate Planning Forms***, 8th Edition.

Skip this step if you purchased the HOMESTUDY.

❏ **Print Book** (ZCEPFB17B - Includes Print & Digital):
❏ Non-member: $269 (per book/plus S&H) ❏ CBA Member: $259 (per book/plus S&H)

❏ **PDF eBook** (ZCEPFB17E - Digital Only):
❏ Non-member: $259 ❏ CBA Member: $249

NOTE: Shipping & handling only applies to orders you receive via mail. Materials will be mailed to you approximately 2 weeks after live program.

Price $ ____________
Shipping & Handling $ 10.95
Subtotal $ ____________
Applicable Sales Tax (7.62% Denver, 4% RTD and 2.9% rest of Colo.) $ ____________

HOMESTUDY / BOOK ORDER FORM TOTAL $ ____________

Name ________________________ Atty. Reg. # ____________
Firm/Organization ________________________
E-Mail Address ________________________
Street Address ________________________
City ________________ State ______ Zip ________
Telephone ( ) ____________ Fax ( ) ____________
❏ Enclosed is my check made payable to **CBA-CLE** ❏ VISA ❏ MasterCard ❏ AmEx
Credit Card # ________________________ Exp. Date ________
Signature *(Required for credit card orders)* ________________________

CLE Use Only: Check #: ________________ Approval #: ________________

CBA-CLE books in action

ORANGE BOOK FORMS

Colorado Estate Planning Forms

Live Program & Live Webcast: **Friday, December 8, 2017**

Live program at the **CBA-CLE Classroom** • 1900 Grant Street, Suite 300, Denver, CO

Submitted for 7 General CLE Credits

Video Replays: **January 3, 2018** • Denver, Colorado Springs, and Grand Junction

REGISTER FOR THIS PROGRAM ONLINE! Go to www.cba-cle.org

Colorado Bar Association CLE
The nonprofit educational arm of the Colorado and Denver Bar Associations

1900 Grant Street, Suite 300, Denver, Colorado 80203-4303

Nonprofit Org.
U.S. Postage Paid
Permit No. 1638
Denver, CO