**8/30/19 Revision 1**

**IACP 20th Annual Networking and Educational Forum**

 ***Presenter Outline for:***

**Collaborative Wills and Estates: Preparing for the Wealth Transfer Tsunami**

*90-minute presentation*

**5 minutes**

1. **Introduction and Overview (Slide #1)**

 **Handout #1: Participant Outline**

**5 minutes**

1. **Why Collaborative Practice in Wills and Estates? Rationale (Slide 2,3,4,5)**
	* The next two decades of intergenerational wealth (Zinta) **(Slides 3,4)**
	* Family disintegration in the court system **(Zinta**) **(Slide 5**)
	* Businesses impacted (Nancy) (Slide 5)
	* Wealth squandered through conflict (Zinta) **(Slide 5)**

**5 minutes**

1. **What shifts need to be made to apply Collaborative Practice to T&E? (training, knowledge, skills, willingness) Question: discussion. (Slide# 6)**
	* Model
	* Clients
	* Financial
	* Mental Health?
	* Other experts?

**10 Minutes**

1. **Unlocking taboos: Breaking down access barriers/family conversations: the opportunites (Slide #7)**
	* Cultural and religious differences when facing death and inheritance (Nancy)
	* Unwillingness to talk about death and money.(Nancy)
	* Procrastination to get affairs in order (Nancy)
	* Choice to ignore the potential conflict (Zinta)
	* Impact of grief on family members (Zinta)

**10 minutes**

1. **Pre-death and Post Death Estate Planning (Slides 8-9-10)**
	* Pre-Death (Planning stage) (Nancy)
	* What does the Team look like?  **(Slide 12)**
		+ Roles and Process **(Nancy)**
		+ What’s different for each professional: Financial; mental health **(Nancy)**
		+ lawyers **(Zinta)**

What about other experts? **(Zinta) (Slide 13)**

**15 minutes**

1. **Case review and genogram (Nancy) (Slide 14)**
* **Video from trainings (Slide 15)**
* **Role Play: (Instructions:)**
	+ Debrief **(Both) (Slide 16)**

**10 Minutes**

1. **Post-death Disputes (Zinta) (Slide 17)**
	* The makeup of the team
	* How to address different interests without making the team unwieldy.
	* What the case would look like post-mortem.

**10 minutes**

1. **Expanding Collaborative Practice locally and globally (Slide 18-19)**
	* Client education **(Slide 20)**
	* New Approaches: Trusts and Estates Options
	* Your dispute resolution menu **(Slide 21)**
	* **Queensland** brochure and **CPSV** brochure **(Slide 22-23)**

**5 minutes**

1. **Models and Materials: Compliance (Slide 24)**
	* Legal
	* IACP
	* Individual discipline specific ethics
	* Changing over time

**5 minutes**

1. **Training (Slide 25)**

**10 minutes**

1. **Q&A**

 **90 minutes total**