**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**