

Application for Approval by the TESB of CLE Course as Trust and Estate Law

Return to:

Indiana State Bar Association
Trust and Estate Specialty Board
One Indiana Square, Suite 530
Indianapolis, IN 46204
Email: bwhaley@inbar.org

Applicant Information:

Name: _____
Address: _____

E-Mail: _____
Phone: _____

Title of Course: _____

Date(s) of Course: _____

Name of Sponsor: _____

Number of CLE hours approved by CLE Commission: General: _____ Ethics: _____ NLS: _____

Topics Covered by Course: (check all that apply & the number of CLE hours per topic):

- _____ Estates in Land; Tangible/Intangible Personal Property
- _____ Formalities of Wills
- _____ Intestate Succession
- _____ Gifts
- _____ Life Insurance and Annuities
- _____ Trusts (including Prudent Investor Act & Principal and Income Act)
- _____ Probate and Administrative Procedures, including Guardianships
- _____ Elections (State Law and Tax Elections)
- _____ Income Taxation of Estates, Trusts and Beneficiaries
- _____ Estate, Gift and Generation-skipping Tax
- _____ Income Tax Basis of Property Acquired by Gift or from a Decedent
- _____ Rules of Professional Conduct
- _____ Non-Probate Assets (e.g. multiple party accounts, retirement/IRA accounts, TOD/POD accounts and jointly owned property)
- _____ Uniform Transfers to Minors Act
- _____ Estate, Trust and Guardianship Litigation Matters
- _____ Documents for Incapacity Planning and Guardianship
- _____ Other: _____

Explain why "other" topic should be treated as trust and estate law: _____

Level of Course:

Beginning _____ Intermediate: _____ Advanced: _____

Audience for whom the course was offered: (check all that apply)

- _____ Attorneys _____ Accountants _____ Other Estate Planning Professionals
- _____ General Public (i.e. such as potential clients)

Applications may only be made by the sponsoring organization or a Board certified trust and estate lawyer.

Attach to the Application, copies of brochures advertising the Course (if available) and copies of the written materials provided at course or the outline of the written materials if materials are over 15 pages.

Applications must be submitted at least thirty (30) days prior to the date you are seeking approval.

Note to Trust and Estate Specialists: If the Course is approved as a trust and estate CLE program, the course will be listed on the Approved Course List on the Trust and Estate Specialty Board's website. If a CLE course is not listed on the website's list that you believe would qualify as a trust and estate CLE course, an application may not have been made. You are encouraged to make an application for a course not listed or you may submit a course not formally approved as trust and estate law CLE course for consideration at the time of your recertification. You may, however, be asked to provide additional information about the course. In addition, a course must be reflected on your official CLE report statement issued by the Indiana Commission for Continuing Legal Education in order for the program to count towards your CLE requirement.