

Trusts in Real Estate

Transferring property to and from trusts

The process of transferring property into or out of trusts can be complicated and confusing. Our panel of experts demystifies the trust transfer process. Topics include the basics of transferring property into and out of trusts, identifying different types of trusts and the implications for transfer, addressing major title issues that arise when transferring property to and from trusts, and recognizing what documentation is needed to successfully complete the transfer. In addition, the panel discusses best practices, traps for the unwary, and common issues that arise at Land Court in this context.

Agenda

- Overview of Considerations Relevant to Real Estate Transfers
- Identifying Types of Trusts; Trustee's Certificates
- How to Properly Transfer Property into and Out of Inter Vivos, Testamentary, and Nominee Trusts
- Major Title Issues That Arise When Transferring Property to or from a Trust
- Considerations When the Real Estate Involves Registered Land
- Trust and Real Estate Litigation Considerations and Risks
- "Ask the Experts" Q&A Session

Faculty

Luke C. Bean, Esq., *Rico, Murphy, Diamond & Bean LLP, Natick, Chair*

Annelle E. Benson, Esq., *Senior Underwriting Counsel, First American Title Insurance Company, Worcester*

Christina T. Geaney, Esq., *Chief Title Examiner, Land Court, Commonwealth of Massachusetts*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Thursday, May 1, 2025

1:00 pm–4:00 pm

Program # 2250182WBC

REBROADCAST

Friday, May 16, 2025

9:00 am–12:00 pm

Program # 2250182RB1

REBROADCAST

Tuesday, May 27, 2025

11:00 am–2:00 pm

Program # 2250182RB2

ON DEMAND WEBCAST

View after Tuesday, May 27, 2025

Program # 2250182WBA

Tuition *(includes written materials)*

- \$245
- \$220.50 MCLE Members
- \$122.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
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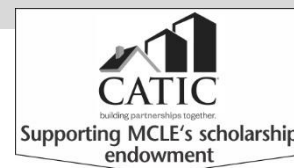
Materials

Understanding and Using Trusts ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

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