

# The Counselor

The newsletter of the Illinois State Bar Association's Business Advice & Financial Planning Section

## Use of an estate planning questionnaire as part of a coordinated process in your practice

BY DENNIS J. JACKNEWITZ AND BRIAN T. MCCARTHY, ATTORNEYS AT LAW

**Estate planning engagements** are processes that can be managed in one's practice more effectively by the use of an estate planning questionnaire. The importance of gathering proper asset and liability information at the beginning of the estate planning process cannot be overstated. Included with this article is a questionnaire form that we use to initiate discussions with the client at the beginning of the planning process.

An estate planning questionnaire is a valuable source of information that enhances the attorney-client relationship and facilitates effective counseling of clients seeking to secure the peace of mind provided by an effective and comprehensive estate plan. For this reason, the estate planning professional should spend time and care to create a questionnaire that reflects the professional's

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## Pre-employment screening in Illinois

BY LAURYN E. PARKS

**When making personnel decisions, such as hiring, promotion, or reassignment,** employers often seek to examine the background of the applicant, including the applicant's credit history or criminal history. However, there is an ever-growing array of Federal, state

and local laws and regulations that limit if or when employers may consider this information. Furthermore, under Title VII, an employer must also consider whether examining the arrest or conviction records

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## Use of an estate planning questionnaire

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experience with his or her clients.

A questionnaire should be provided to the estate-plan-client in advance of an in-person consultation. Information reported on the questionnaire should place the estate planning professional in position to focus on the desires and challenges unique to a particular client.

### PRACTICE POINTER

It is advisable to send an engagement letter to prospective clients that reflects an estate planning professional's understanding of what he or she is asked to provide. This will reduce future misunderstandings about the scope of representation and proper identity of who is the client. An engagement letter allows for introduction of such a questionnaire.

*The practice of estate planning tends toward older clients whose adult children frequently assist aging parents with financial affairs. Like most professionals who practice in this area, I have encountered many an adult child who fails to appreciate the line between assisting an elderly parent with their decisions and making decisions for the elderly parent. Similarly, I have encountered other family members who claim this line has been crossed. In both regards, I rely on my own notes of client consultations and client responses to my questionnaire to demonstrate my efforts are directed toward the goals expressed by the client.*

First, the most effective attorney-client relationship is based on a full disclosure of all factual information that may have a bearing on advice the attorney is called to provide. Accordingly, a questionnaire should seek enough detail about an estate-plan-client's **identity, relationships and assets** that allows the professional to make organize inquiries at an in-person consultation about the client's goal for his or her estate plan. It is advisable that the estate planning professional have sufficient information from his or her client about the best means to communicate during the planning process and to underscore the means by which the professional will keep all such communications confidential.

Identity information should be complete enough that the professional understands

the residential, marital, familial and business background of his or her client. Because of the increasing importance of governmental benefits available which can impact an estate plan, identity information should include comprehensive treatment of time in the armed services, as well as other state or federal employment.

Relationship information includes all necessary background on how an estate-plan-client arranged and organized his or her interpersonal relationships. This includes the treatment of spouses, former spouses, children—natural, adopted or blended, as well as other relationships having significance to the client. It is important to make inquiry about specific means by which an estate-plan-client presently manages his or her financial decisions.

### PRACTICE POINTER

An essential skill the estate planning professional brings to a consultation with the prospective client is thorough knowledge of possibilities for arranging an effective program for handling an individual's assets during periods of incapacity and after death. Creativity in the presentation of these possibilities sharpens the understanding of the client and yields a more faithful arrangement of the client's wishes.

*In nearly every in-person consultation with putative clients and long-term clients, I engage in some form of role-playing. I find this approach to be a non-confrontational way to present to the client concerns that might be flagged in the responses to my estate planning questionnaire. Recently, in one example, I presented what I thought might be a reasonable concern of an adult child who lived a great distance from the client. The client responded, "My son would never say that. Never!" I started to explain that I merely wanted her to visualize a possible alternative way of viewing a particular disposition of her estate, and the client interrupted, saying, "... But his wife would." This rejoinder led to a very important discussion that will hopefully avoid future discord with this client's family.*

Asset information should provide the estate planning professional with a clear picture of what assets the client understands

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he or she owns, how these assets are held, who may have a claim to these assets in addition to the client, and what the client wishes to become of the assets upon their death. A proper questionnaire should elicit information about a client's prior efforts to establish an estate plan and the reasons for a present consultation on estate planning. Within the inquiries as to assets, a questionnaire should also direct attention to life-care planning and funeral and burial plans. Life-care planning encompasses client

choices as to long-term placement for health and medical care, designation of surrogate decision-makers, and end-of-life decisions. A proper estate planning questionnaire should elicit the status of any insurance the client has relative to relationships and assets. The form of a questionnaire should reflect the realities of your practice. Bear in mind that the form is less important than the information gathered. A comprehensive form can ensure a thorough disclosure and complete analysis of the client's potential

estate. A sample form used by the authors is included below. ■

\_\_\_\_\_

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**ESTATE PLANNING INFORMATION AND SUGGESTIVE IDEAS**

**I. PERSONAL**

1. NAME: \_\_\_\_\_ BIRTHDATE \_\_\_\_\_

2. SPOUSE: \_\_\_\_\_ BIRTHDATE \_\_\_\_\_

2.A. SIGNIFICANT OTHER: \_\_\_\_\_ BIRTHDATE \_\_\_\_\_

3. HOME ADDRESS: Street: \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

BUS. ADDRESS: Street: \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

4. TELEPHONE: RES: \_\_\_\_\_ BUS: \_\_\_\_\_ CELL: \_\_\_\_\_

5. OCCUPATION: \_\_\_\_\_ SPOUSE: \_\_\_\_\_

6. PRIOR MARRIAGE(S): \_\_\_\_\_

Date of Dissolution

Name of Former Spouse

7. CHILDREN: \_\_\_\_\_

Name

Birthdate

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Do you want to treat any of your children differently from an estate planning perspective? \_\_\_\_\_

8. GRANDCHILDREN: \_\_\_\_\_

Name

Birthdate

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Please complete on additional sheet if needed.

9. PLEASE LIST PERSONS OR ORGANIZATIONS THAT YOU WISH TO LEAVE PROPERTY TO: \_\_\_\_\_

\_\_\_\_\_

[Other than persons previously listed hereinabove]

U.S. Citizen? Yes  No

U.S. Citizen? Yes  No

War-time Veteran? Yes  No

War-time Veteran? Yes  No

Branch of Service \_\_\_\_\_ Service Number \_\_\_\_\_

If yes, list any benefits you are currently receiving: \_\_\_\_\_

Were you at any time the widow or widower of a wartime veteran? Yes  No

If yes, name and date of death of veteran: \_\_\_\_\_

**STATE PHARMACEUTICAL PLAN**

Are you currently on PAAD (Pharmaceutical Assistance to the Aged and Disabled Program) or any other state pharmaceutical plan?

Yes  No

10. PRENUPTIAL OR OTHER PROPERTY DISPOSITION AGREEMENT: \_\_\_\_\_

11. SPECIAL FAMILY PROBLEMS: (Disability, family dispute, etc.) \_\_\_\_\_

12. SAFETY DEPOSIT BOX LOCATION: \_\_\_\_\_

Persons with access to safety deposit box:

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_

13. DO YOU WANT TO BENEFIT A CHARITY OR CHARITIES? \_\_\_\_\_

- (A) From a tax viewpoint, it is better to make charitable gifts during lifetime than at death.
- (B) In a Will or Trust, offer language that surviving spouse should consider making charitable gift from additional share given to spouse rather than gifting property to charity by Testamentary Will or Trust.

14. Have you ever filed a Federal Gift Tax Return? Yes  No

If so, please state details \_\_\_\_\_

Have you used any generation skipping tax (GST) exemption? Yes  No

If so, please state details. \_\_\_\_\_

15. What is your email address? \_\_\_\_\_

In a Will, Trust, or Power of Attorney for Property consider adding language that allows your Executor, Trustee or agent deal with your digital property.

**II. WILL AND TRUST INFORMATION**

**1. HEIRSHIP - FAMILY INFORMATION**

Name of FATHER/CLIENT: \_\_\_\_\_

Names of Father's Living Parents: \_\_\_\_\_

Names of Father's Living Brother(s) and Sister(s): \_\_\_\_\_

Are any inheritance(s) anticipated? Yes  No  When? \_\_\_\_\_ Approx. Value:\$ \_\_\_\_\_

Date of this Marriage: \_\_\_\_/\_\_\_\_/\_\_\_\_ Any prior marriage(s)? Yes  No

Name of MOTHER/CLIENT: \_\_\_\_\_ Maiden: \_\_\_\_\_

Names of Mother's Living Parents: \_\_\_\_\_

Names of Mother's Living Brother(s) and Sister(s): \_\_\_\_\_

Are any inheritance(s) anticipated? Yes  No  When? \_\_\_\_\_ Approx. Value:\$ \_\_\_\_\_

Any prior marriage(s)? Yes  No  Any outstanding obligations by either party? \_\_\_\_\_

**CHILDREN (if married give married names - note any children from multiple marriages)**

1. Name: \_\_\_\_\_ Spouse's Name: \_\_\_\_\_

Address: \_\_\_\_\_ Telephone #: \_\_\_\_\_

Grandchildren: \_\_\_\_\_

2. Name: \_\_\_\_\_ Spouse's Name: \_\_\_\_\_

Address: \_\_\_\_\_ Telephone #: \_\_\_\_\_

Grandchildren: \_\_\_\_\_

3. Name: \_\_\_\_\_ Spouse's Name: \_\_\_\_\_

Address: \_\_\_\_\_ Telephone #: \_\_\_\_\_

Grandchildren: \_\_\_\_\_

4. Name: \_\_\_\_\_ Spouse's Name: \_\_\_\_\_  
 Address: \_\_\_\_\_ Telephone #: \_\_\_\_\_  
 Grandchildren: \_\_\_\_\_

Are any of the children from a prior marriage? Yes  No   
 Do any of your children/child's spouse have difficulty managing money? Yes  No   
 Have, for whatever reason, you done more for one child than another? Yes  No

PLEASE LIST PERSONS OR ORGANIZATIONS THAT YOU WISH TO LEAVE PROPERTY TO: [Other than persons previously listed hereinabove] \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

2. EXECUTORS AND SUCCESSOR EXECUTORS:

	Name	Address	Bond/Surety
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____

3. TRUSTEES AND SUCCESSOR TRUSTEES:

	Name	Address	Bond/Surety
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____

4. ADVISORS:

	Name	Address	Telephone
Attorney:	_____	_____	_____
Accountant:	_____	_____	_____
Insurance Agent:	_____	_____	_____
Investment Advisor:	_____	_____	_____

5. SPECIFIC GIFTS, BEQUESTS, ETC.

	Name	Address	Specific/General	Amount/ Asset
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

6. MEMORIAL SERVICE AND BURIAL DIRECTIONS

Memorial Service: \_\_\_\_\_  
 My body should be buried at: \_\_\_\_\_  
 My body should be cremated and the ashes: \_\_\_\_\_  
 My body should be donated to: \_\_\_\_\_  
 Specific Comments, Wishes and Thoughts Related to Memorial Service and Burial: \_\_\_\_\_

7. ESTATE OF MINOR OR DISABLED CHILDREN:

Name of Child or Children: \_\_\_\_\_

A. GUARDIAN OF PERSON OF MINOR OR MINORS:

	Name	Address
1.	_____	_____
2.	_____	_____

B. GUARDIAN OF ESTATE

	Name	Address
1.	_____	_____
2.	_____	_____

The 2016 Federal estate tax exemption, which is adjusted for inflation, is \$5,450,000.

<b>III. ASSET INFORMATION</b>			
(Detail on separate sheet if necessary)			
	Husband's Property	Wife's Property	Jointly Owned Property or Tenancy by the Entirety
RESIDENTIAL			
REAL ESTATE IN ILLINOIS:	\$ _____	\$ _____	\$ _____
RESIDENTIAL REAL ESTATE IN OTHER STATES/COUNTRIES:	\$ _____	\$ _____	\$ _____
COMMERCIAL REAL ESTATE:	\$ _____	\$ _____	\$ _____
FARM PROPERTY:	\$ _____	\$ _____	\$ _____
CASH/BANK ACCOUNTS	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____
STOCKS/BONDS	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____
PERSONAL NOTES/RECEIVABLE	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____
BUSINESS INTERESTS: (Detail on separate sheet; attach balance sheet, income statement)			
	Husband's Property	Wife's Property	Jointly Owned Property or Tenancy by the Entirety
Sole Proprietorship	\$ _____	\$ _____	\$ _____
Corporation	\$ _____	\$ _____	\$ _____
Partnerships	\$ _____	\$ _____	\$ _____
Collectibles (art works, comic books, baseball cards, etc.)	\$ _____	\$ _____	\$ _____
Other (i.e. Trust, LLC, etc.)	\$ _____	\$ _____	\$ _____
Retirement Plans:	\$ _____	\$ _____	\$ _____
1. IRA Plans	\$ _____	\$ _____	\$ _____
2. 401 (k) Plan	\$ _____	\$ _____	\$ _____
3. Other Plans	\$ _____	\$ _____	\$ _____
Life Insurance (See last page):	\$ _____	\$ _____	\$ _____
Household Effects	\$ _____	\$ _____	\$ _____
Automobiles	\$ _____	\$ _____	\$ _____
Farm Equipment	\$ _____	\$ _____	\$ _____
Personal Effects	\$ _____	\$ _____	\$ _____
Other Assets:	\$ _____	\$ _____	\$ _____
TOTAL ASSETS:	\$ _____	\$ _____	\$ _____
LIABILITIES:			
Mortgages on Real Estate	\$ _____	\$ _____	\$ _____
Notes Payable	\$ _____	\$ _____	\$ _____

	Husband's Property	Wife's Property	Jointly Owned Property or Tenancy by the Entirety
Current Bills	\$ _____	\$ _____	\$ _____
Income Taxes Payable	\$ _____	\$ _____	\$ _____
Other	\$ _____	\$ _____	\$ _____
<b>TOTAL LIABILITIES</b>	\$ _____	\$ _____	\$ _____
<b>NET WORTH:</b>	\$ _____	\$ _____	\$ _____
<b>INSURANCE: (See last page).</b>	\$ _____	\$ _____	\$ _____

Proceeds \$ \_\_\_\_\_ Cash Value \$ \_\_\_\_\_

LIST ANY OTHER SPECIAL CONCERNS

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**IV. POWERS OF ATTORNEY**

1. Property Power of Attorney - consider special language for gifts to loved ones and charitable gifts by power of attorney holder.

Name and Address of Attorney-in-fact

1. \_\_\_\_\_
2. \_\_\_\_\_

2. Health Care Power of Attorney/Living Will (Illinois, Missouri, or another state)

Name and Address of Attorney-in-fact

1. \_\_\_\_\_
2. \_\_\_\_\_

**INSURANCE INFORMATION**

Four questions you should ask yourself before purchasing an insurance policy:

1. Could you afford the loss?
2. Is the coverage adequate for your desired needs?
3. Is the coverage necessary? (Make sure the coverage doesn't duplicate coverage you already have?)
4. Are you getting your monies worth regarding the purchase of this type of insurance?

**LIFE INSURANCE DATA**

Company: \_\_\_\_\_

Insured: \_\_\_\_\_

Owner: \_\_\_\_\_

Primary Beneficiary: \_\_\_\_\_

Contingent Beneficiary: \_\_\_\_\_

Death Proceeds: \_\_\_\_\_

Type of Policy: (ie. Term, Whole Life, Second to Die, etc.) \_\_\_\_\_

Add Attachment - if needed

Have you considered Long Term Care Insurance? Yes  No

Do you have long-term care insurance? Yes  No

If yes, name of company \_\_\_\_\_ How many years does it cover? \_\_\_\_\_

IRS Circular 230 Disclaimer: If the foregoing includes any tax advice, while we maintain our responsibility to you with respect to such advice, it IS neither written nor intended to be used, and cannot be used, for the purposes of avoiding Federal tax penalties. A formal opinion meeting specific requirements set forth in the new U.S. Treasury guidelines may be required to avoid Federal tax penalties.

## Pre-employment screening in Illinois

CONTINUED FROM PAGE 1

of applicants could lead to direct or indirect discrimination.

### Credit Histories

Under both Illinois and Federal law, an employer is restricted as to if, or when, it can inquire into an applicant's credit history. The Illinois Employee Credit Privacy Act, 820 ILCS 70/1, et seq. ("ECPA"), provides that an employer may not order an applicant or employee's credit report, inquire about the applicant's employment history, or otherwise discriminate against an individual on the basis of his or her credit history or credit report unless the position in question meets certain criteria. 820 ILCS 70/10. Exempted from these requirements are employers in the financial and insurance industries and certain governmental employers. Otherwise, in order to inquire into applicant's credit history, a satisfactory credit history must be an "established bona fide occupational requirement" of the position. The statute elaborates on several duties which meet this criteria, including having management responsibilities; custody or unsupervised access to cash or marketable assets valued at \$2,500 or more; or having access to confidential information, financial information or trade secrets. 820 ILCS 70/10(b).

Recently, Illinois courts have demonstrated that they will construe these factors narrowly in order to discourage the use of pre-employment credit checks for positions that do not clearly fall within an exemption. In *Ohle v. The Neiman Marcus Group*, 2016 IL App (1st) 141994, the plaintiff was denied an entry-level position as a "Dress Collections Sales Associate" on the basis of her credit check. Neiman Marcus claimed that the sales associate fell within one of the listed exemptions to the ECPA because the position would have given the plaintiff "access" to personal and confidential consumer information when she accepted store credit card applications from customers. Id. at ¶11. The court found that the employees were merely acting as

"conduits" for the information and that this does not qualify as "access" under the ECPA. The court cautioned that the purpose of the ECPA is to "help those who have fallen on hard times find employment" and that an employer cannot find an exception under the ECPA for a position that consists of "performing simple tasks at the cash register." Id. at ¶40.

Even if an employer can meet one of the exemptions of the ECPA, it must also meet the disclosure and reporting requirements set by the Fair Credit Reporting Act, (FCRA), 15 U.S.C. Sect. 1681, et seq. The FCRA sets out three stages of disclosure and reporting that must be met by employers who seek to obtain a "consumer report" for a job applicant.

Under the FCRA, the employer must make certain disclosures to applicants *prior* to obtaining a consumer report. Specifically, the employer must make a clear and conspicuous disclosure in writing, in a separate document that consists only of the disclosure, that a consumer report may be obtained for employment purposes, and the applicant must authorize the procurement of the report in writing. 15 U.S.C. Sect. 1681b(b)(2)(A). If the consumer report forms the basis for an adverse employment decision, either in whole or in part, the employer must provide the applicant with a copy of the report and "A Summary of Your Rights Under the Fair Credit Reporting Act." 15 U.S.C. Sect. 1681b(b)(2)(B). The statute is silent as to how long the employer must wait after providing the applicant with notice before taking the adverse employment decision, or as to whether it has any duty to reconsider this decision if the applicant contacts the employer. If the employer fails to provide the applicant with any of the pre-adverse decision disclosures and information, the applicant may file a private suit 15 U.S.C. Sect. 1681n-o. If the employer moves forward with the adverse employment action, it must provide additional written notice to the applicant, which must contain a statement of the applicant's rights to obtain a free copy of

the report and dispute the accuracy or completeness of its information. 15 U.S.C. Sect. 1681m.

### "Ban-the-Box" Laws

In addition to restrictions on the use of credit reports in employment screening, there has been a recent rise in "ban-the-box" laws which typically delay when an employer may access information regarding the applicant's criminal history.

The Illinois Job Opportunities for Qualified Applicants Act, 820 ILCS 75/1 et seq., prohibits an employer from considering or inquiring into an applicant's criminal record or history until after the applicant has been notified of an impending interview or, if no interview is to take place, until after a conditional offer of employment has been made. 820 ILCS 75/15.

There are exceptions to this prohibition if (i) the employer is required by federal or state law to exclude applicants with criminal convictions, (ii) a fidelity bond is required for the position and the applicant's criminal history would disqualify the applicant from receiving the bond, or (iii) where the position requires licensing under the Emergency Medical Services Systems Act. 820 ILCS 75/15(b)(1)-(3).

Employers should also keep in mind Federal and state law prohibiting "disparate treatment" and "disparate impact" employment discrimination. For example, disparate treatment discrimination in violation of Title VII occurs where the employer rejects an African American applicant on the basis of his criminal record, but hires a similarly situated white applicant with a comparable criminal record. EEOC Enforcement Guidance: Enforcement Guidance on the Consideration of Arrest and Conviction Records in Employment Decisions Under Title VII and the Civil Rights Act of 1964, ([https://www.eeoc.gov/laws/guidance/arrest\\_conviction.cfm](https://www.eeoc.gov/laws/guidance/arrest_conviction.cfm)) (last visited on November 15, 2016). Furthermore, if an employer's policy or practice significantly

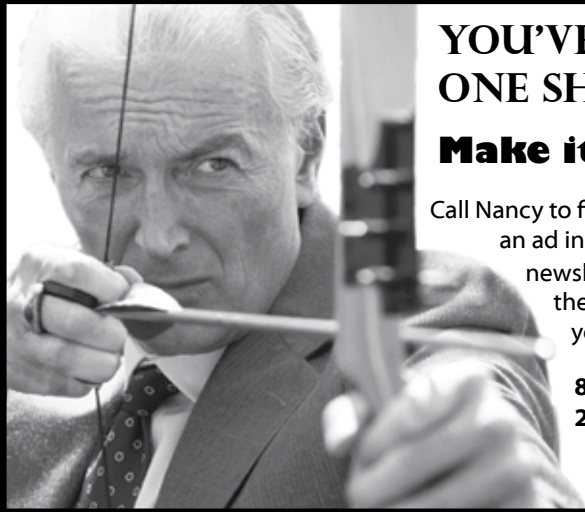


disadvantages individuals of a particular race, national origin or other protected characteristic, the employer must be prepared to justify the policy or practice and demonstrate that the exclusion is “job related and consistent with business necessity” for the position. *Id.*

This myriad of laws and regulations should caution employers to carefully develop any pre-employment screening process that considers an applicant’s credit or criminal histories so that it is compliant with applicable law and tailored to the duties and requirements of the specific position. ■

Lauryn E. Parks is an associate attorney with Momkus McCluskey, Roberts, LLC.

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## March

**Wednesday, 3-1-27 – Webcast**—A New Summary Judgment Standard for Discrimination Cases: *Ortiz v Werner Enterprises, Inc.* Presented by the Labor & Employment Section. 1:00 – 2:00 pm.

**Thursday, 3-2-17 – Webinar**—Introduction to Legal Research on Fastcase. Presented by the Illinois State Bar Association – Complimentary to ISBA Members Only. 12:00 – 1:00 pm.

**Thursday, 03-02-17—Chicago, ISBA Regional Office**—Family Law Table Clinic Series—Session 4. Presented by Family Law.

**Friday, 03-03-17- Chicago, ISBA Regional Office & Webcast**—8th Annual Animal Law Conference. Presented by Animal Law. 9:00 a.m. – 5:00 p.m.

**Wednesday, 03-08 – Live Webcast**—Life After High School: Post-Secondary Transition Options and Education Protections for Young Adults with Disabilities. Presented by the Standing Committee for Disability Law; Co-sponsored by the Education Law Section. 10:00 am – 12:00 pm.

**Wednesday, 03-08 – Webinar**—Engagement Letters, Timesheets & Billing Tips. Presented by the Committee on Law Office Management and Economics. 12:00 pm – 1:00 pm.

**Thursday, 03-09-17 – Webinar**—Advanced Tips for Enhanced Legal Research on Fastcase. Presented by the Illinois State Bar Association – Complimentary to ISBA Members Only. 12:00 – 1:00 pm

**Thursday, 03-09 and Friday, 03-10—New Orleans**—Family Law Update 2017: A French Quarter Festival. Presented by Family Law. Thursday: 12:00 pm – 5:45 pm; Reception 5:45- 7:00 pm. Friday: 9:00 am –

5:00 pm.

**Tuesday, 03-14-17- Webinar**—Matter Management Software- Why Outlook Isn't Good Enough. Practice Toolbox Series. 12:00 -1:00 p.m.

**Wednesday, 03-15-17- Live Webcast**—Economic Development in Your Community: Learn from the Leaders. Presented by Local Government Law Section. 1:00 pm – 3:00 pm.

**Thursday, 3-16-17 – Webinar**—Fastcase Boolean (Keyword) Search for Lawyers. Presented by the Illinois State Bar Association – Complimentary to ISBA Members Only. 12:00 – 1:00 pm.

**Wednesday, 03-22-17- Live Webcast**—Housing Justice v. Housing Injustice: How Unfair Housing Practices Keep Segregation Intact. Part 3: Mortgage Fraud, Subprime Lenders, and Foreclosure Crisis. Presented by Committee on Racial and Ethnic Minorities; multiple cosponsors (see agenda). 1:00 – 3:00 p.m.

**Thursday, 03-23-17 – Live Webcast**—Immigration Hearings: How to Get the Job Done. Presented by the Administrative Law Section; Co-sponsored by the International and Immigration Law Section. 1:00 – 2:00 pm.

**Friday, 03-24-17- Chicago, ISBA Regional Office**—Jury Selection Techniques and the Use of Jury Focus Groups. Presented by Labor and Employment. TIME TBD—full day.

**Tuesday, 03-28-17- Webinar**—Access Your Documents from Anywhere and Share Them with Others. Practice Toolbox Series. 12:00 -1:00 p.m.

**Wednesday, 03-29-17- Chicago, ISBA Regional Office & Live Webcast**—Professional Responsibility and Ethics—

Spring 2017. Presented by General Practice. 12:50 p.m. – 5:00 p.m.

**Friday, 03-31-2016 – iWireless Center, Moline**—Solo and Small Firm Practice Institute Series: A Balancing Act: Technology Tips and Maximizing Your Profit. ALL DAY.

## April

**Thursday, 04-06-17- Chicago, ISBA Regional Office**—Housing Justice v. Housing Injustice: How Unfair Housing Practices Keep Segregation Intact. Part 4: Resources for Rebuilding. Presented by REM; multiple cosponsors (see agenda). 1:00 – 5:00 p.m. (program). 5:00 – 6:00 p.m. (reception).

**Friday, 04-07-17—NIU, Hoffman Estates**—DUI and Traffic Law Updates—Spring 2017. Presented by Traffic Law and Courts. 8:55 – 4:00.

**Tuesday, 04-11-17- Webinar**—TBD. Practice Toolbox Series. 12:00 -1:00 p.m.

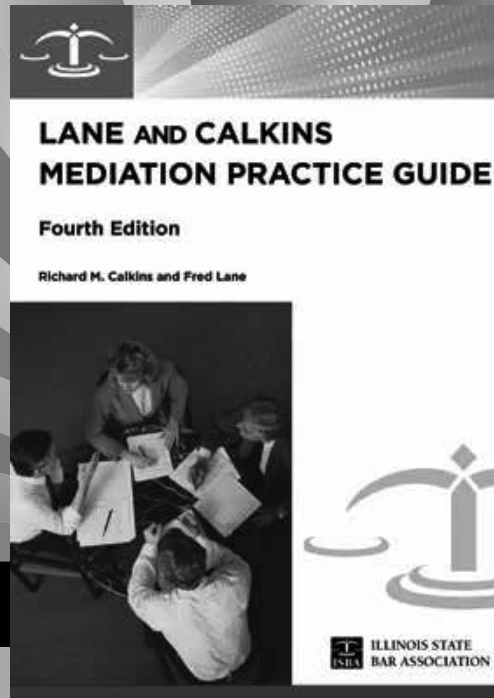
**Wednesday, 04-12-17 – Chicago Regional Office**—Nuts and Bolts of Illinois Administrative Hearings. Presented by the Administrative Law Section. 12:45 – 4:00 pm.

**Wednesday, 04-12-17 – Live Webcast**—Nuts and Bolts of Illinois Administrative Hearings. Presented by the Administrative Law Section. 12:45 – 4:00 pm.

**Wednesday, 04-12-17 – Chicago Regional Office**—Nuts and Bolts of Illinois Administrative Hearings. Presented by the Administrative Law Section. 12:45 – 4:00 pm.

**Wednesday, 04-12-17 – Live Webcast**—Nuts and Bolts of Illinois Administrative Hearings. Presented by the Administrative Law Section. 12:45 – 4:00 pm. ■

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