

20th Annual

Advanced Estate Planning Strategies Course

**LIVE**

Denver, Colorado

The Brown Palace Hotel and Spa

April 24-25, 2014

This highly interactive conference among expert panelists and attendees will address four high-level estate planning topics you may struggle with in your daily practice.

Topics include:

- Recipes for Income and Estate Tax Planning in 2014
- Stop the Bus, I Want to Get Off! - Business Succession Planning in 2014
- It Slices; It Dices; It Makes Julienne Fries: Cutting-Edge Trust Tools
- It's Too Late to Say You're Sorry - A Selection of Litigation Topics

Special Luncheon Presentation on Thursday

Join us for a presentation by James E. Hughes, renowned author and expert in estate and trust planning, as he challenges you to think about how you draft.

DOWNLOADABLE
COURSE MATERIALS



MCLE CREDIT | 13 HOURS (3 ETHICS)

Advanced Estate Planning Strategies Course

Cosponsored by the Real Estate, Probate and Trust Law Section of the State Bar of Texas

LIVE Denver, Colorado
The Brown Palace Hotel and Spa

April 24-25, 2014

Real Estate, Probate and Trust Law
Section members can save \$100!

 #TBCLEepstrat

Wednesday

6:15 – 8:00 p.m.

**Welcoming Social – Check in
for the course and meet your
colleagues**

Sponsored by Cadence



Thursday

7 hours including 2 hour ethics

8:00 **Registration**
Continental Breakfast
Sponsored by
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MCLE CREDIT

13 HOURS (3 ETHICS)
MCLE COURSE NO: 901282502
Applies to the College of the State
Bar of Texas and to the Texas Board
of Legal Specialization in Estate
Planning and Probate Law and Tax
Law.

8:30 **Welcoming Remarks** **Course Director**

Shannon G. Guthrie, *Bedford*
Benenati Law Firm

8:45 **Recipes for Income and Estate Tax Planning in 2014 3 hrs (.5 ethics)** **Let's Dish About Estate Planning, Creating New Concoctions with:**

- Portability
- Disclaimer trusts
- QTIPs and Clayton QTIPs
- General powers and formulas for
basis adjustment planning
- The Delaware Tax Trap

Special Ingredients to Consider:

- Grantor trust planning and other
twists
- Creative lifetime gift planning
- Implications of the demise of
DOMA

Moderator

Mickey R. Davis, *Houston*
Davis & Willms

Lora G. Davis, *Dallas*
The Blum Firm

Stephanie E. Donaho, *Houston*
Locke Lord

Alvin J. Golden, *Austin*
Ikard Golden Jones

11:45 **Break - Lunch Provided**

12:00 **Luncheon Presentation:**
**The pilgrim's journey of a serving
private client attorney—our
history and its destruction
in modernity—can it be
reconstructed? 1 hr ethics**
James (Jay) E. Hughes Jr, *Aspen, CO*
Author of *Family Wealth: Keeping It
in the Family*

1:00 **Networking Break**

1:30 **Stop the Bus, I Want to Get Off!** **- Business Succession Planning in 2014 3 hrs (.5 ethics)**

- Addressing planning related to
all family businesses regardless
of whether the estate is above or
below the estate tax threshold
- Outlining structures to position the
family business for transition
- Analyzing key issues in
transitioning the family business
within the family, to key employees
or, to outside parties
- Examining key estate and income
tax implications in the transition
of the family business, including
the effects of 409A, the 3.8% tax
on net investment income, and
portability implications
- Exploring other issues that impact
the family business succession
process including use of trusts and
material participation, funding the
buy-sell agreement/insurance, and
operating covenants

Moderator

Jeffrey N. Myers, *Fort Worth*
Bourland Wall & Wenzel

I. Scott Carter, *Dallas*
Mincey-Carter, PC

Steven B. Gorin, *St. Louis, MO*
Thompson Coburn LLP

Tina R. Green, *Texarkana*
Capshaw Green

4:30 **Adjourn to Cocktail Party
and Reception**
Sponsored by
Frost Wealth Advisors





Friday

6 hours including 1 hour ethics

8:00 **Continental Breakfast**

**Sponsored by
Stout Risius Ross, Inc.**

SRR
STOUT | RISIUS | ROSS

8:25 **Announcements**

8:30 **It Slices; It Dices; It Makes Julienne
Fries: Cutting-Edge Trust Tools**

3 hrs (.5 ethics)

- Trust protectors, advisors, committees; directed and special trustees
- When is a trust no longer a trust?, factors affecting fiduciary duties, "secret" trusts
- Decanting, trust modifications, situs, and choice of law
- Perpetual trusts
- Self-settled asset protection trusts

But Wait – There's More!

- What to do with "unnecessary" trusts
- What to discuss with your clients

Moderator

William D. Pargaman, *Austin*
Saunders, Norval, Pargaman & Atkins

Ronald D. Aucutt, *Tysons Corner, VA*
McGuireWoods LLP

Marjorie J. Stephens, *Dallas*
Smith & Stephens

Melissa J. Willms, *Houston*
Davis & Willms

11:30 **Break - Lunch on Your Own**

1:00 **It's Too Late to Say You're Sorry -
A Selection of Litigation Topics**

3 hrs (.5 ethics)

- Causes of action and remedies
- Estoppel
- Statutes of limitations
- Getting information
- Arbitration

Moderator

Hal Moorman, *Brenham*
Moorman, Tate, Haley, Upchurch &
Yates, L.L.P.

Frank N. Ikard Jr, *Austin*
Ikard Golden Jones

Lisa H. Jamieson, *Fort Worth*
Shannon, Gracey, Ratliff & Miller

Cameron McCulloch, *Houston*
MacIntyre & McCulloch

Joyce W. Moore, *San Antonio*
Langley & Banack

4:00 **Adjourn**

Mark Your Calendar!

Join us for the
**38th Annual
Advanced
Estate Planning
& Probate COURSE**

LIVE San Antonio

Hyatt Hill Country Resort and Spa
Tuesday - Thursday
June 10-12, 2014

VIDEO Houston

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July 16-18, 2014

VIDEO Dallas

Cityplace Events
July 23-25, 2014

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Probate Drafting
COURSE**

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October 9-10, 2014

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Parking Information for Attendees Not Staying at the Hotel

is subject to change without notice and is not a guarantee of available space. Parking at The Brown Palace Hotel and Spa is valet only and is \$25 per day.

If You Need Special Accommodations to Attend,

please contact us as soon as possible at 800-204-2222, x1748.

If You Registered But Can't Attend, You May Request a Refund.

Mail or fax (512-427-4443) your request so that we receive it at least one business day before the program.

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Contact Julie Marshall at 512-427-1797 or julie.marshall@texasbar.com.

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Reserve Your Hotel Room by March 28

Hotel rooms have been blocked at special rates on a space available basis. To make a reservation, contact the hotel and indicate that you will be attending this State Bar of Texas course.

DENVER Live

The Brown Palace Hotel and Spa

321 17th Street

Denver, Colorado 80202

800-321-2599

\$209/night

Deadline: March 28

<http://www.marriott.com/meeting-event-hotels/>



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5075

1

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- ☐ **Regular Registrant** \$895
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Registration includes:

- Continental breakfast provided both days
- Lunch provided on Thursday
- Socials on Wednesday and Thursday
- Complimentary wireless connection in the meeting room

2

I want my course materials format to be:

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4

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