



## Estate Planning Fundamentals

Co-sponsored by the Kansas City Estate Planning Symposium and University of Missouri–Kansas City School of Law

Tuesday, October 18, 2016 – Registration 7:30 AM; Seminar 8:00 AM – 4:20 PM  
UMKC Pierson Auditorium, Atterbury Student Success Center,  
5000 Holmes, Kansas City, MO 64110

Cost: \$85

Continuing Education Credit:

CLE credit: Missouri ~ 8.8, includes 1.0 ethics / Kansas ~ 8.0, includes 1.0 ethics

CPE Credit: up to 8.5 hours

CFP CE Credit pending

### DESCRIPTION

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This “Fundamentals” program includes presentations on many of the subjects you will encounter today in your practice. This is a program not to miss for the new estate planning professional or for those who need a brush-up on the state of affairs in today’s estate planning practice. Although formatted for lawyers, this program will prove valuable for lawyers, trust officers, CPAs and all estate planning professionals.

### COMMENTS FROM PAST ATTENDEES

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- “Very informative, useful information. Good networking to identify local contacts and resources.”
- “I appreciate that the speakers adhered to the fundamentals and did not assume a lot of prior knowledge. The materials will be very helpful. Good range of topics.”
- “Even though I’ve done some estate planning, I learned a lot. Great job.”
- “Very highly. Everything runs so fluidly. Not a single irrelevant or less than captivating topic. Loved the panel discussion.”
- “Best one I have been to.”
- “Excellent, as a CPA was very informative to see the view of estates and trusts from an attorney perspective.”

More information and online registration at [KCEPS.org](http://KCEPS.org).

Location of Program  
PIERSON AUDITORIUM  
5000 HOLMES,  
KANSAS CITY, MO 64110  
(816) 235-1648 PHONE  
(816) 235-6552 FAX

**Course materials:** Speaker materials will be provided in electronic format and are only accessible with your laptop, tablet or other mobile device during the event. Final course materials, parking directions, and a map will be emailed two days prior to the event.

**Parking:** On campus parking information and passes will be emailed to individuals who are registered at least one week in advance. Registrations received after that may pick up a parking pass at the desk on the date of the event.

**Substitutions** for paid registrations are accepted.

**No shows** will not receive a refund or credit voucher. No shows requesting refunds due to emergency or hardship must be received in writing no more than 30 days after the event date.

**Special accommodations** can be made by contacting UMKC CLE at (816) 235-1648 prior to the program date.

[Law.umkc.edu/cle](http://Law.umkc.edu/cle)



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## SCHEDULE

- 7:30 AM **Registration**
- 8:00 AM **Issues and Considerations Regarding Using Trust vs. Wills; Importance of Trustee Selection**  
Donald Friend II, *Friend & Associates, LLC*
- 8:35 AM **Trust Funding - Filling the Bucket**  
Garrett Griffin, *BridgeBuilder Tax + Legal Services, PA*
- 9:00 AM **Drafting**  
Christine M. Graham, *BMO Financial Group*
- 9:30 AM **Durable Powers of Attorneys and Health Care Directives**  
Ruth Brackney, *Lathrop & Gage, LLP*
- 9:55 AM Break**
- 10:10 AM **Navigating the Basics of Elder Law in your Estate Planning Practice**  
Samantha Shepherd, *Shepherd Elder Law Group, LLC*
- 10:40 AM **Unwrapping Unique Charitable Gifts: Key Issues for Donors and Charities**  
Corey Ziegler, *Greater Kansas City Community Foundation*
- 11:05 AM **Tax Planning for the Other 99%: The Fundamentals of the Income Taxation of Estates and Trusts**  
Kevin Conley, *UMB Bank*
- 11:35 AM **Understanding Insurance**  
Kevin Johnson, *New York Life Insurance Company*
- 12:00 PM Box Lunch (included in fee)**
- 12:30 PM **IRA/Qualified Retirement Plans**  
Mindy Ward, *Van Osdol PC*
- 1:00 PM **Why Family Businesses Fail and How to Reduce the Odds that Yours Will**  
H. Joseph Price, Jr., *Dysart Taylor Cotter McMonigle & Montemore, P.C.*
- 1:25 PM **Practice Management for Estate Planners (Panel Discussion)**  
**Moderator:** JJ Cook, *The Commerce Trust Company*  
**Panel:** Erin Anderson, *The Counts Law Firm LLC*, Kelly Jurgensen, *Post Anderson Layton Lindstrom LLP*, Mary Nan Dupont, *Dupont Law Firm*, Ryan White, *Evans & Mullinex P.A.*
- 2:15 PM Break**
- 2:30 PM **For Better or Worse...Unless Otherwise Agreed: An Introduction to Prenuptial Agreements**  
Greg Kincaid, *Kreamer, Kincaid, Taylor, Lipsman, Parks & Arney LC*
- 3:05 PM **Litigation**  
Scott Martinsen, *Kirkland Woods & Martinsen PC*
- 3:35 PM **Recent Ethics and Malpractice Developments in Estate - Trust Practice**  
Prof. Francis Hanna, *UMKC School of Law*
- 4:20 PM Adjournment and Networking Happy Hour**

\*Schedule subject to change. Course materials will be provided in electronic format only and are accessible with your laptop, tablet or other mobile device during the event.