



Estate Planning Fundamentals 2017

Tuesday, October 17, 2017

UMKC Pierson Auditorium, Atterbury Student Success Center
5000 Holmes, Kansas City, Missouri 64110

This LIVE in person event is also available via webcast

Cost: \$95 Includes parking and lunch; Law Students and 2017 Law Graduates Attend Free

Continuing Education Credit:

CLE credit: Missouri ~ 9.3, includes 1.0 ethics / Kansas ~ 8.0, includes 1.0 ethics

CPA CPE Credit: up to 9.0 hours

CFP CE Credit: 9.0 hours

CFRE CE Points: 7.75

Networking Reception
Sponsored by



Description

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, Fund Raising Executives, and all estate planning professionals.

COMMENTS FROM PAST ATTENDEES

- “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 [recommended]. Everything runs so fluidly. Not a single irrelevant or less than captivating topic. Loved the panel discussion.”
- “Best [CLE] 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.

Turn the page over to learn how to pre-register for this event!
Visit law.umkc.edu/clevents, email UMKCCLE@UMKC.EDU or call 816-235-1648





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

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Registration 7:30 AM; Seminar 8:00 AM – 4:45 PM; Networking reception 4:45 pm; Cost: \$95

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CFRE CE: 7.75 pts | CPA CPE 9.0 | CFP CE 9.0

SCHEDULE

- 7:30 AM **Registration**
- 8:00 AM **Issues and Considerations Regarding Using Trust vs. Wills; Importance of Trustee Selection**
H. Joseph Price, Jr., *Dysart Taylor Cotter McMonigle & Montemore, P.C.*
- 8:35 AM **Trust Funding**
Suzy Hall, *Country Club Trust Company, N.A.*
- 9:00 AM **Drafting (What Should Be in Every Trust & Guidance on Basic Drafting)**
Kevin M. Conley, *Baker University*
- 9:50 AM **Durable Powers of Attorneys and Health Care Directives**
Thomas M. Ruane, *Polsinelli, PC*
- 10:10 AM **Break**
- 10:25 AM **Basics of Elder Law – What You Need to Know and Essential Resources**
Stacey L. Janssen, *Dysart Taylor Cotter McMonigle & Montemore, P.C.*
- 10:55 AM **Planning for Special Needs – The Use of Trusts, ABLE Accounts and Other Alternatives**
Craig C. Reaves, CELA, *Reaves Law Firm, PC*
- 11:25 AM **The Basics of Asset Protection**
Paul R. Himmelstein, *Van Osdol, PC*
- 12:00 AM **Box Lunch (included in fee)**
- 12:30 PM **Avoiding Malpractice in an Estate & Trusts Practice (Ethics)**
Sam S. Phillips, *Office of the Chief Disciplinary Counsel - Missouri Supreme Court*
- 1:20 PM **Estate Planning with IRAs and Qualified Plans**
Gayle Evans, *Chinnery Evans & Nail, PC*
- 2:10 PM **Considerations when Planning for Same-Sex Couples**
Heather Counts Garrett, *The Counts Law Firm, LLC*
- 2:40 PM **Break**
- 2:55 PM **What Every Planner Should Know about Income Taxation of Trusts and Estates**
Scott E. Blakesley, *Spencer Fane, LLP*
- 3:25 PM **The Estate Planning Process – From Client Intake to Document Execution**
Moderator: Jerald J. “JJ” Cook, *The Cook Law Firm, LLC*
Panel: Steven R. Anderson, *Post Anderson Layton Heffner, LLP*, Kim S. Zellmer, *Zellmer Law Firm, LLC*, Joseph D. Gowney, *Lathrop & Gage, LLP*, Amy Vinton, *The Law Offices of Amy Vinton*
- 4:15 PM **Litigation – Estate Planning Issues that are Commonly Litigated**
Gretchen M. Gold, *Lathrop & Gage, LLP*
- 4:45 PM **Adjournment/ Networking reception sponsored by Midwest Trust**

*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.