KANSAS CITY ESTATE PLANNING SYMPOSIUM

Jump Start - or Re-Energize - Your Practice with

Estate Planning Fundamentals 2018

Wednesday, October 17, 2018
UMKC Pierson Auditorium,
Atterbury Student Success Center
5000 Holmes, Kansas City,
Missouri 64110

Fundamentals is a one-day basic program focused on the topics and challenges encountered in today's practice. Presented by working professionals from the various disciplines of estate planning, Estate Planning Fundamentals is an insightful introduction for professionals new to estate planning or to those who would benefit from a refresher course. Although formatted for lawyers, this program will prove valuable for trust officers, CPAs, fund-raising executives, and all estate planning professionals.

This LIVE in-person event is also available via webcast
As it has in prior years, Pierson Auditorium is virtually assured to sell out. In addition, an unlimited number of individuals can join us from their desk or home via webcast. Please indicate your preference on the registration form – **ACT NOW** for best selection.

Cost: $125 Includes parking and lunch.
Law Students Attend Free

Continuing Education Credit:

CLE Credit: Missouri 9.3 / Iowa 7.75 / Kansas 8.0
Nebraska 7.75

CPA CPE: 9.0

CFP CE: 9.0

CFRE CE: 9.0 Points

Insurance Credit: Missouri, Kansas, Iowa - 9.0

Here's what past attendees are saying about Fundamentals:

"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."

UMKC School of Law

More information and online registration at KCEPS.org. Visit law.umkc.edu/cleevents, 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

SCHEDULE

Wednesday, October 17, 2018 – UMKC Pierson Auditorium, 5000 Holmes Street, Kansas City, Missouri 64110

7:30 AM	***Registration and Breakfast***
8:00 AM	**Why and When Should You Recommend a Trust vs. a Will?** Christine M. Graham, *UMB Bank*
8:35 AM	**Trust Funding and Non-probate Transfers** Russ Utter, *BridgeBuilder Tax + Legal Services, P.A.*
9:00 AM	**Drafting (What Should Be in Every Trust & Guidance on Basic Drafting)** Eric Ireland, *Commerce Trust*
9:50 AM	**Durable Powers of Attorneys and Health Care Directives** Lynn Cockle, *Polsinelli, PC*
10:10 AM	**Break**
10:25 AM	**Basics of Elder Law – What You Need to Know and Essential Resources** Maureen Lester, *Shepherd Elder Law Group, LLC*
10:55 AM	**Basic Tax Considerations for Estate Planners including the 2017 Tax Reform Update** Julie Welch, *Meara Welch Browne, P.C.*
11:30 AM	**Life Insurance and Annuity Contracts** Kevin Petracek, *Wells Fargo Private Bank*
NOON	**Box Lunch (included in fee)**
12:30 PM	**Planning for Beneficiaries – Incentive Trusts** Scott Blakesley, *Spencer Fane LLP*
1:20 PM	**Digital Assets** Alice Haseltine, *Kirkland Woods & Martinsen LLP*
1:50 PM	**Charitable Giving** Evan Lange, *The Signatry*
2:20 PM	**Break**
2:35 PM	**LLCs, Partnerships, Corporations – Entity Considerations for Estate Planners** Teal Dakan, *BKD, LLP*
3:05 PM	**Several Advisors; One Client. Bringing the Team Together** **Moderator:** Jerald J. "JJ" Cook, *The Cook Law Firm, LLC* **Panel:** Carole L. Anderson, CPA; Peter Phillips, *U.S. Bank Private Wealth Management*; Elizabeth Rowe, *Husch Blackwell LLP*; John Christensen, *Keel Point*
3:55 PM	**Estate Planning with IRAs and Qualified Plans** Kevin Conley, *Baker University*
4:45 PM	***Adjournment*/ Networking reception**

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