



Intermediate Estate Planning 2018

Wednesday, January 31, 2018

E. E. "Tom" Thompson Courtroom, UMKC School of Law
500 E. 52nd Street, Kansas City, Missouri 64110

This LIVE in person event is also available via webcast

In-Person Only Credit: CPA CPE: 4.0; CFRE: 3.5 pts;

MO & KS insurance: 4.0; CFP: 4.0 hours

Cost: \$125 includes parking pass and breakfast



Description

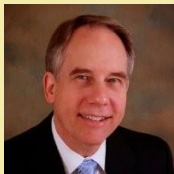
The "Intermediate" Estate Planning Program is the bridge between the Estate Planning all-day "Fundamentals" Program in the fall of each year and the two-day Estate Planning Symposium in the spring of each year. This half-day program will go in- depth on two estate planning topics every estate planner will encounter in their practice. This is a "can't miss" program for anyone who wants to be engaged in the estate planning practice. Formatted for lawyers, this program will provide invaluable information to any professional whose practice or career touches any area of estate planning.

Schedule

7:30 a.m. Registration and Breakfast

8:00 a.m. **How to Make a Trust a "Special Needs Trust"**

Special needs trusts hold assets for the benefit of the beneficiary without causing disqualification from public assistance. One must be careful when designing, drafting, and reviewing a special needs trust. Many standard clauses normally included in trusts can cause the trust to fail, which often results in the beneficiary being disqualified from public assistance programs. This presentation will review the different types of special needs trusts and when they should be used. It will walk through clauses that should be included, and excluded, when drafting a special needs trust. At the end of the presentation attorneys will be more prepared when drafting special needs trusts, and financial advisors and others will be more informed when reviewing them.



Craig C. Reaves, CELA, is an attorney with Reaves Law Firm PC, in Kansas City, Missouri. He practices law in Kansas and Missouri with major emphasis in the areas of estate planning, elder law, special needs trusts and planning for persons who have a disability. He has been an adjunct professor of law and teaches an elder law course at both the University of Kansas School of Law and the University of Missouri-Kansas City School of Law since 2002.

9:40 a.m. Break

10:00 a.m. **IRA/Qualified Plan Beneficiary Designation including those payable to Trusts**



Christopher Hoyt is a Professor of Law at the University of Missouri (Kansas City) School of Law where he teaches courses in the area of federal income taxation and charitable organizations. Professor Hoyt has served as the Chair of the American Bar Association's Committee on Charitable Organizations (Section of Trusts and Estates) and he serves on the editorial board of Trusts and Estates magazine.

11:40 a.m. Adjourn

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 UMKCCLC@UMKC.EDU or call 816-235-1648

