Intermediate Estate Planning 2019

Intermediate Estate Planning offers an in-depth look at two real-world estate-planning topics encountered by every estate planner. It provides an essential bridge between the more basic "Fundamentals" event and the national-caliber educational experience of the KCEPS Annual Conference: The Kansas City Estate Planning Symposium, held in the spring of each year.

The Intermediate Estate Planning event offers a "can't miss" program for anyone who wants to be more knowledgeable and engaged in an estate planning practice. Although formatted for lawyers, this program will prove highly valuable for trust officers, CPAs, fund-raising executives, and all estate planning professionals.

Friday, February 1, 2019

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.

Cost: $125 includes parking pass and breakfast.

Continuing Education Credit: **CLE Missouri: 4.0**
CLE Kansas: 4.0 • CPA, CFP: 4.0 CFRE Credit: 3.25 points
All credit will be the same for webcast and in-person attendees.

*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.

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

Friday, February 1, 2019 • E. E. "Tom" Thompson Courtroom, UMKC School of Law • 500 E. 52nd Street, Kansas City, Missouri 64110

7:30 AM — ***Registration and Breakfast***

8:00 - 9:40 AM — **Flexible Trust Planning in Uncertain Times**

Scott Blakesley, Spencer Fane, LLP

The continued uncertain status of the tax laws adds an additional challenge to an estate planner whose task is to help a client develop and document an appropriate plan for the future disposition and management of assets. In this session, Scott will discuss the importance of drafting and utilizing trust provisions that take into account the constantly changing tax rules, while still effectively addressing a client's goals, assets and family situation. Furthermore, specially designed trusts and trust provisions can assist a client in making sure their wishes are carried out as to the results they would like to see regarding the impact of the assets they are leaving for their intended beneficiaries. Quality estate planning is much more than just "who gets what when" – but should involve documents that provide structure and guidance as to the way assets should and should not be used in the future in order to provide true benefits for the generations that follow.

Scott Blakesley is a partner and leader of Spencer Fane's Kansas City estate planning group. Scott's practice involves all areas of estate planning and trust and estate administration, including family-owned businesses, planning for multiple generations, charitable gift planning, tax-exempt organizations, estate and gift tax planning, and general advice and counseling for family members involved in business and estate planning. Scott is the 2019 Chair for the Kansas City Estate Planning Symposium and has been selected The Best Lawyers of America®, Trusts and Estates, from 1995-2019

9:40 AM — ***Break***

10:00 - 11:40 AM — **Business Entity Considerations – From Design 'Till Death Do Us Part**

Teal Dakan

This session will provide an overview of the tax aspects of common business entities, to help the client select an entity in the planning stage to achieve their current and long-term objectives, including transfers during lifetime or at death. We will also discuss operating and income tax basis aspects of these entities at death, including elections available at the fiduciary and entity levels, potential planning opportunities, valuations and traps for the unwary.

Teal is the North Region leader for BKD's Private Client Services (PCS) tax team. In that capacity, he provides sophisticated income, estate and gift tax compliance, consulting and planning services to privately owned businesses, affluent families, fiduciaries and private foundations. He is also a designated and trained BKDnext® advisor. BKDnext is an intentional process designed to help business owners develop a comprehensive succession and continuity plan to achieve financial security for their businesses, their families and their futures. Teal is a current member and past president of the Kansas City Estate Planning Society.

11:40 AM — ***Adjourn***

*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.