2015 Stanley M. Johanson Estate Planning Workshop
December 4, 2015 • Radisson Hotel and Suites, Austin-Downtown • Austin, TX
December 4, 2015 • Live Webcast

Friday Morning, Dec. 4, 2015

Presiding Officer:
Stanley M. Johanson, The University of Texas School of Law - Austin, TX

7:30 am In Austin Only	**Registration Opens** Includes continental breakfast.
8:30 am 1.25 hrs	**Recent Developments Affecting Estate Planning** Consider recent cases, regulations, rulings and other "hot" estate planning topics relating to valuation issues, new basis at death rule, marital deduction, portability election, qualified plans, IRAs, and more. Stanley M. Johanson, The University of Texas School of Law - Austin, TX
9:45 am	**Break**
10:00 am 1.00 hr	**Asset Protection Trusts in Texas? Really?** It's not likely that Texas will ever pass "true" asset protection trust legislation. (We've tried.) But in recent years, the legislature has expanded our spendthrift trust statute to allow certain types of self-settled trusts to be protected from the settlor's creditors. Learn various planning opportunities embedded in the Texas spendthrift trust statute. Amy P. Jetel, Beckett Tackett & Jetel, PLLC - Austin, TX Melissa J. Willms, Davis & Willms, PLLC - Houston, TX
11:00 am 1.00 hr	**GST Issues: Tricks and Traps for the Unwary** Explore selected generation-skipping transfer tax issues, including tricks and traps relating to properly reporting trust contributions and modifying or decanting trusts. Strategies for cleaning up some common tax reporting errors that relate to GST trusts will also be discussed. R. Eric Viehman, Ytterberg Deery Knull LLP - Houston, TX
12:00 pm In Austin Only	**Pick Up Lunch (in Austin)** Included in registration.

Friday Afternoon, Dec. 4, 2015

Presiding Officer:
Stanley M. Johanson, The University of Texas School of Law - Austin, TX

LUNCHEON PRESENTATION

12:20 pm 0.75 hr	**Valuation Issues in Estate Planning** Obtain guidance in reading and commenting on valuation reports, with a focus on assisting readers in refining appraisals to ensure that gift, estate, and generation-skipping transfer tax returns are prepared in a manner that is most defensible in audit and in court, if need be. Stephanie Loomis-Price, Winstead PC - Houston, TX
1:05 pm	**Break**
1:20 pm 1.00 hr	**Who's in Charge—Using Directed Trusts** Understand how to use directed trusts in Texas, including a review of the Uniform Act and the new Texas Directed Trust statute. Jeffrey N. Myers, Bourland, Wall & Wenzel, P.C. - Fort Worth, TX
2:20 pm	**Break**
2:30 pm 1.50 hrs 0.75 hr ethics	**Estate Planning Workshop** Address practical and ethical concerns commonly faced by practitioners in the estate planning area, covering hot-button issues stemming from recent cases, rulings and regulations (final and proposed). Gain insight on current "hot" estate planning techniques. Moderator: Stanley M. Johanson, The University of Texas School of Law - Austin, TX Panelists: Stephen R. Akers, Bessemer Trust - Dallas, TX Mickey R. Davis, Davis & Willms, PLLC - Houston, TX Amy P. Jetel, Beckett Tackett & Jetel, PLLC - Austin, TX Jeffrey N. Myers, Bourland, Wall & Wenzel, P.C. - Fort Worth, TX R. Eric Viehman, Ytterberg Deery Knull LLP - Houston, TX Melissa J. Willms, Davis & Willms, PLLC - Houston, TX
4:00 pm	**Adjourn**