

2016 Stanley M. Johanson Estate Planning Workshop

December 2, 2016 • Radisson Hotel and Suites, Austin-Downtown • Austin, TX

Friday Morning, Dec. 2, 2016

Presiding Officer:

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

7:30 am	Registration Opens Includes continental breakfast.
8:20 am	Welcoming Remarks
8:30 am 1.25 hrs	Recent Developments Affecting Estate Planning Consider recent cases, regulations, rulings, and other "hot" estate planning topics. Stanley M. Johanson, The University of Texas School of Law - Austin, TX
9:45 am	Break
10:00 am 1.00 hr	The New Basis Consistency and Value Reporting Rules What hath Treasury wrought on executors? Learn the latest about the basis consistency rules and best practices for completing Form 8971 and reporting values on related Schedules A. Contemplate options for changing estate administration protocols to reduce this reporting burden. Join your colleagues in appreciating the challenges that this new reporting requirement brings to your practice! Lora G. Davis, Davis Stephenson, PLLC - Dallas, TX
11:00 am 1.00 hr	Repairing Estate Plans That Are No Longer Appropriate Sometimes the best laid plans of clients and their estate planning lawyers go astray. Sometimes we devise the ideal plan for a client but, due to the occurrence of unforeseeable circumstances or a change in the law, the plan no longer is appropriate. Or rather, the plan works fine but unanticipated factors afford the opportunity to shift additional wealth for the client. Explore what tools we can bring to the table to modify or unwind an existing estate planning transaction to accomplish a client's current goal. Jordan M. Ware, Winstead PC - Austin, TX
12:00 pm	Pick Up Lunch Included in registration.

Friday Afternoon, Dec. 2, 2016

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LUNCHEON PRESENTATION

12:20 pm 0.75 hr	<p>Transfer-on-Death and Lady Bird Deeds</p> <p>What are you going to say when your new (or old) client asks you to prepare a TODD or Lady Bird Deed? Consider whether these documents are the latest “save-me-from-probate” cure-all or the newest wrecking ball to the well-coordinated estate plan.</p> <p>Pamela D. Orsak, Law Office of Pamela Orsak - Victoria, TX</p>
1:05 pm	<p>Break</p>
1:20 pm 1.00 hr	<p>Washington Update: Counting Votes, Recounting Fables, and Discounting Values</p> <p>Assess the federal legislative and regulatory environment, with a special focus on finalizing the proposed section 2704 valuation regulations. Will minds be closed to real tax reform? Will the door be closed to valuation discounts in the family controlled entity? Will family businesses have to be closed because they can't pay the transfer tax? Will the bar be closed before Aucutt is finished? Hear answers to these questions and more.</p> <p>Ronald D. Aucutt, McGuireWoods LLP - McLean, VA</p>
2:20 pm	<p>Break</p>
2:30 pm 1.50 hrs 0.75 hr ethics	<p>Estate Planning Workshop</p> <p>Address practical and ethical concerns commonly faced by practitioners in the estate planning area, including hot-button issues stemming from recent cases, rulings, and regulations (final and proposed). Gain insight on current "hot" estate planning techniques.</p> <p>Moderator: Stanley M. Johanson, The University of Texas School of Law - Austin, TX</p> <p>Panelists: Stephen R. Akers, Bessemer Trust - Dallas, TX Ronald D. Aucutt, McGuireWoods LLP - McLean, VA Lora G. Davis, Davis Stephenson, PLLC - Dallas, TX Mickey R. Davis, Davis & Willms, PLLC - Houston, TX Jerome M. Hesch Esq., Aventura, FL Pamela D. Orsak, Law Office of Pamela Orsak - Victoria, TX Jordan M. Ware, Winstead PC - Austin, TX</p>
4:00 pm	<p>Adjourn</p>