2017 Stanley M. Johanson Estate Planning Workshop
December 15, 2017 • DoubleTree by Hilton Hotel Austin • Austin, TX

Friday Morning, Dec. 15, 2017

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** Hear Professor Johanson's popular and always-informative review of the latest 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	**Choice of Entities: When to S Corporation, When to LLC, When to FLP, and Why** S corporations, LLCs, and limited partnerships are all popular vehicles to consider when forming a family business. Learn the tax and non-tax issues that go into deciding when to choose which entity. Gene Wolf Jr., Kemp Smith LLP - El Paso, TX
11:00 am 1.00 hr	**Lighting the Way to the Exit: Drafting to Facilitate Terminating Distributions by Fiduciaries** Review the issues to consider, the information to gather, and documents to prepare when making distributions from trusts and estates. What are the best practices not only to make distributions, but to make sure that the fiduciary is protected and the files are complete? Arielle M. Prangner, Davis & Willms, PLLC - Houston, TX
12:00 pm	**Pick Up Lunch** Included in registration.

Friday Afternoon, Dec. 15, 2017

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

LUNCHEON PRESENTATION

12:20 pm 0.75 hr	**Non-Probate Transfers of All Kinds** Take an intensive look, both academic and interesting, at the ever-increasing use of tools to transfer wealth at death beyond a will. Steven D. Baker, Giordani, Swanger, Ripp & Jetel, LLP - Austin, TX
1:05 pm	**Break**
1:20 pm 1.00 hr	**Planning in a Period of Uncertainty, Including Using Defined Value Clauses** Learn practical planning approaches for dealing with clients in light of the possibility of estate tax repeal. Review transfer planning approaches that minimize the risk of paying current gift taxes, and the practicalities of using defined value clauses. Stephen R. Akers, Bessemer Trust - Dallas, TX
2:20 pm	**Break**
2:30 pm 1.50 hrs	**Estate Planning Workshop** 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. Moderator: Stanley M. Johanson, The University of Texas School of Law - Austin, TX Panelists: Stephen R. Akers, Bessemer Trust - Dallas, TX Steven D. Baker, Giordani, Swanger, Ripp & Jetel, LLP - Austin, TX Mickey R. Davis, Davis & Willms, PLLC - Houston, TX Arielle M. Prangner, Davis & Willms, PLLC - Houston, TX Gene Wolf Jr., Kemp Smith LLP - El Paso, TX
4:00 pm	**Adjourn**