

# **2018 Stanley M. Johanson Estate Planning Workshop**

## **November 16, 2018 • AT&T Conference Center • Austin, TX**

### **Friday Morning, Nov. 16, 2018**

**Presiding Officer:**

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

7:30 am	<b>Registration Opens</b>  Including continental breakfast.
8:20 am	<b>Welcoming Remarks</b>
8:30 am 1.25 hrs	<b>Recent Developments Affecting Estate Planning</b>  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	<b>Break</b>
10:00 am 1.00 hr	<b>Fathers, Mothers, Sisters, Brothers and Others: Shower the People You Love With "Tangential" Planning</b>  "Tangential relationships" for which an estate and trust attorney may have to develop a plan often include committed couples and new spouses of the same gender. But property issues or claims may arise out of tangential relationships as diverse as children born as the result of nontraditional reproductive technology to employer-employee matters. Explore how to negate some relationships, establish others, and provide for those that exist in law or in fact.  Rhonda H. Brink, Brink Bennett Flaherty Golden - Austin, TX
11:00 am 1.00 hr	<b>Financial Abuse of Elders and Other At-Risk Adults: The Crime of the Twenty-First Century</b>  Address the scope of Elder Financial Abuse (EFA), how to recognize and minimize the risk of EFA, and actions to take when EFA has been perpetrated and discovered.  Kristen M. Lewis, Smith, Gambrell & Russell, LLP - Atlanta, GA
12:00 pm	<b>Pick Up Lunch</b>  Included in registration.

### **Friday Afternoon, Nov. 16, 2018**

**Presiding Officer:**

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

## LUNCHEON PRESENTATION

12:20 pm 0.75 hr ethics	<p><b>Of Mice and Metadata: Ethics, Client Confidentiality, and the Duty of Competence in the Digital Age</b></p> <p>Focus on the electronic communication of confidential client information, including analyses of recent ethics opinions, and hear suggested "best practices."</p> <p><i><b>Please Note:</b> Ethics hours for this session were not included in the printed brochure or promotional emails. The <a href="#">online brochure</a> accurately reflect the total accredited hours. Contact UT Law CLE with any questions.</i></p> <p>Bernard E. ("Barney") Jones, Attorney at Law - Houston, TX</p>
1:05 pm	<b>Break</b>
1:20 pm 1.00 hr	<p><b>Ten Tools Every Estate Planner Should Know How to Use</b></p> <p>Exemptions, rates, and brackets may rise and fall, and estate planners' focus may shift from transfer taxes to income taxes and back. But no matter how laws change, certain tools that should be in every estate planner's toolbox. Learn techniques that every estate planner needs to understand, including a discussion on when and how to use them, what to watch out for, and how to explain them in a way your clients will understand.</p> <p>Mickey R. Davis, Davis &amp; Willms, PLLC - Houston, TX</p>
2:20 pm	<b>Break</b>
2:30 pm 1.50 hrs	<p><b>Estate Planning Workshop</b></p> <p>Address practical 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 Rhonda H. Brink, Brink Bennett Flaherty Golden - Austin, TX Mickey R. Davis, Davis &amp; Willms, PLLC - Houston, TX Bernard E. ("Barney") Jones, Attorney at Law - Houston, TX Kristen M. Lewis, Smith, Gambrell &amp; Russell, LLP - Atlanta, GA</p>
4:00 pm	<b>Adjourn</b>