

# **2019 Stanley M. Johanson Estate Planning Workshop**

## **December 6, 2019 • AT&T Conference Center • Austin, TX**

### **Friday Morning, Dec. 6, 2019**

**Presiding Officer:**

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

7:30 am	<b>Conference Room Opens</b>  Includes 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>Succession Planning for Owners of the Successful Pass-Through Entity</b>  Analyze the personal and financial obstacles that arise when passing ownership of a family business on to the next generation. Learn how a preferred partnership structure can be used in balancing the need to treat all the children equally when only some play an active management role. Discover how key employees can be given an equity interest in the family business without adverse income tax treatment and without putting undue financial pressure on the key employee. Finally, review alternatives used to defer payment of the estate taxes.  Jerome M. Hesch Esq., Adjunct Professor of Law - Miami, FL
11:00 am 1.00 hr	<b>Use and Misuse of Business Entities in Estate Planning: Miscellaneous Tax Issues</b>  Examine income and/or transfer tax issues associated with solutions for family rivalry and business succession issues for family businesses.  Richard B. Robinson, Robinson, Diss and Clowdus, P.C. - Denver, CO
12:00 pm	<b>Pick Up Lunch</b>  Included in registration.

### **Friday Afternoon, Dec. 6, 2019**

**Presiding Officer:**

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

## LUNCHEON PRESENTATION

	<b>Thank You to Our Sponsor</b>  <b>BBVA</b>
12:20 pm 0.75 hr	<b>Practice Tips for IRS Estate and Gift Tax Inquiries from Cradle to Grave</b>  Learn the latest trends in dealing with the IRS from the examination level through litigation. Discover procedural matters, issues currently being raised by the IRS in audits, little-known procedural anomalies, and traps for the unwary.  Josh O. Ungerman, Meadows, Collier, Reed, Cousins, Crouch & Ungerman, L.L.P. - Dallas, TX
1:05 pm	<b>Break</b>
1:20 pm 1.00 hr	<b>Dos and Don'ts of Estate Planning for Millennials</b>  Millennials are taking over. They now make up the largest portion of the U.S. labor force, and it is time we started paying attention to them. Learn about some of the differences that distinguish millennials from prior generations and learn which estate planning strategies are particularly relevant for millennial clients.  Christine Wakeman, Winstead PC - Dallas, TX
2:20 pm	<b>Break</b>
2:30 pm 1.50 hrs	<b>Estate Planning Workshop</b>  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.  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 Jerome M. Hesck Esq., Adjunct Professor of Law - Miami, FL Josh O. Ungerman, Meadows, Collier, Reed, Cousins, Crouch & Ungerman, L.L.P. - Dallas, TX Christine Wakeman, Winstead PC - Dallas, TX
4:00 pm	<b>Adjourn</b>