

# 2020 Stanley M. Johanson Estate Planning Workshop

## December 4, 2020 • Live Webcast

**Friday Morning, Dec. 4, 2020**

**Presiding Officer:**

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

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>5-Minute Break</b>
9:50 am 0.75 hr	<b>Estate and Tax Planning for the 2020 Election: What Estate Planners Should Advise their Clients</b>  Review ideas that estate planners should consider as they advise clients on how to respond to the 2020 elections! Consider best uses for expiring gift exclusions and GST exemptions, while providing clients with control in an uncertain environment through the use of trusts. Evaluate the use of powers of appointments to provide basis step-up, planning flexibility, and more.  Marty Shenkman, Shenkman Law - Fort Lee, NJ
10:35 am	<b>5-Minute Break</b>
10:40 am 0.75 hr	<b>The SECURE Act: What Estate Planners Need to Know</b>  The SECURE Act is the biggest estate planning change impacting retirement plans in two decades. Learn how the Act changes the way we plan for clients who have significant retirement plan assets, including changes to how we use trusts as retirement plan beneficiaries, and special planning that might need to be done for clients who want to name disabled, chronically ill, minor children, or close-in-age beneficiaries for their retirement assets.  Stephen R. Akers, Bessemer Trust - Dallas, TX Melissa J. Willms, Davis & Willms, PLLC - Houston, TX
11:25 am	<b>5-Minute Break</b>
11:30 am 0.75 hr	<b>Charitable Planning Ideas Your Clients Can Use</b>  Understand common charitable estate planning tools and learn to explain them in ways your clients will understand. Explore using donor-advised funds vs. private foundations, designing split-interest trusts to fit your clients' needs, and using charitable trusts to mimic stretch IRA's after the SECURE Act.  Mickey R. Davis, Davis & Willms, PLLC - Houston, TX
12:15 pm	<b>Break for Lunch—Presentation Resumes at 12:40 p.m.</b>

## Friday Afternoon, Dec. 4, 2020

### Presiding Officer:

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

### Luncheon Presentation

12:40 pm 0.75 hr	<p><b>Planning for Beneficiaries with Disabilities</b></p> <p>Supplemental Needs Trusts have been a recognized estate planning tool for more than a quarter-century, yet for many practitioners, they are still mysterious. Learn the vocabulary and reasoning behind Supplemental Needs Trusts, when they are best used, and essential strategies to keep in mind when creating and administering these important trusts.</p> <p>Elisa Dillard Rainey, Rainey &amp; Rainey, Attorneys at Law LP - Waco, TX</p>
1:25 pm	<p><b>5-Minute Break</b></p>
1:30 pm 0.75 hr	<p><b>From Here to Eternity: Designing Trusts for the Long Haul</b></p> <p>Trusts are typically designed to last for decades and often generations. They need to be clear and comprehensive enough to be understood and administered by many parties over the years, and flexible enough to adapt to changing economics, personal circumstances, and tax and trust laws. Learn key terms and features of trusts that will meet the test of time.</p> <p>David A. Handler, Kirkland &amp; Ellis LLP - Chicago, IL</p>
2:15 pm	<p><b>5-Minute Break</b></p>
2:20 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 the recent elections, as well as recent cases, rulings, and regulations. Gain insight into how current "hot" estate planning techniques are being used in the trenches.</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 Mickey R. Davis, Davis &amp; Willms, PLLC - Houston, TX David A. Handler, Kirkland &amp; Ellis LLP - Chicago, IL Elisa Dillard Rainey, Rainey &amp; Rainey, Attorneys at Law LP - Waco, TX Marty Shenkman, Shenkman Law - Fort Lee, NJ Melissa J. Willms, Davis &amp; Willms, PLLC - Houston, TX</p>
3:50 pm	<p><b>Adjourn</b></p>