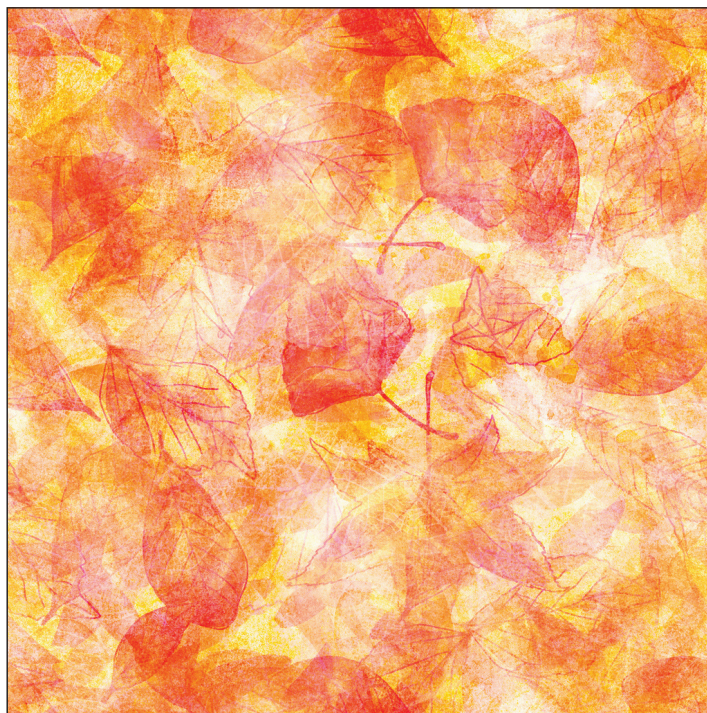


2022 STANLEY M. JOHANSON

ESTATE PLANNING WORKSHOP



December 2, 2022

DoubleTree by Hilton Hotel Austin ■ Austin, Texas

 Also Available as a Live Webcast December 2

Earn up to 6.75 Hours of Credit

MCLE Credit Approved in TX, CA, OK, and PA (Hours Vary by Jurisdiction)

Specialization Credit Approved for Estate Planning and Probate Law and Tax Law

TX and National Accounting CPE and Certified Financial Planner (CFP) Credit Available

NASBA Credit Available for In-Person Conference Only

2022 STANLEY M. JOHANSON
ESTATE PLANNING WORKSHOP

December 2, 2022 ■ DoubleTree by Hilton Hotel Austin ■ Austin, Texas

Earn up to 6.75 Hours of Credit

MCLE Credit Approved in TX, CA, OK, and PA (Hours Vary by Jurisdiction)

Specialization Credit Approved for Estate Planning and Probate Law and Tax Law

TX and National Accounting CPE and Certified Financial Planner (CFP) Credit Available

NASBA Credit Available for In-Person Conference Only

Times listed are in Central Time

FRIDAY MORNING, DEC. 2, 2022

Presiding Officer:

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

7:30 a.m. Registration Opens

Includes continental breakfast.

8:20 a.m. Welcoming Remarks

8:30 a.m. 1.25 hrs

Recent Developments Affecting Estate Planning

The discussion centers on recent federal cases and rulings that affect our estate planning clients, including the regulations dealing with estate tax deductions under section 2053 and Reinstated Clawback.

Turney P. Berry, Wyatt Tarrant & Combs LLP,
Louisville, KY

9:45 a.m. 15-Minute Break

10:00 a.m. 1.00 hr

Evaluating Estate Planning Techniques in a Rising Interest Rate Environment

Current and anticipated future interest rates often determine when certain estate planning tools will be effective. Interest rates can be a key factor in determining not only what techniques to consider, but also when it makes the most sense to use them. Learn about conditions leading to the Federal Reserve System's rate hikes. Review the relationship between interest rates and transfer tax planning. Examine several rate-sensitive wealth transfer techniques, and learn how best to recommend the right tools for your clients in a rising interest environment.

Kelly Perez, J.P. Morgan Private Bank, Dallas, TX

11:00 a.m. 1.00 hr

Beneficiary-Grantor Trusts: Effective Planning with Defective Trusts

Explore techniques designed to trigger grantor-trust treatment as to a trust beneficiary under IRC 678, including BDTs, BDOTs, and QSSTs; understand the advantages and disadvantages of each technique; and discuss mistakes to avoid in drafting and implementation.

Levi M. Dillon, Bourland, Wall, & Wenzel, P.C., Fort Worth, TX

12:00 p.m. Pick Up Lunch

Included in registration.

FRIDAY AFTERNOON

Presiding Officer:

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

LUNCHEON PRESENTATION

12:30 p.m. 1.00 hr

23 & Me: The Downside of Sharing Your DNA

With the proliferation of Ancestry.com and 23 & Me, people are more curious than ever before about their biological family members, both living and deceased. For people of significant wealth, this can cause problems if someone "out of the blue" claims a right to wealth or inheritance. Using lessons learned from an actual case, this presentation provides tips and best practices for drafting a will and trust to avoid problems, outlines what happens if someone, particularly a high-net-worth individual, dies with or without a trust or will, and describes the expense, both monetarily and relationally, involved in fighting this type of claim.

Cleveland G. Clinton, Gray Reed, Dallas, TX
Gregory W. Sampson, Gray Reed, Dallas, TX

1:30 p.m. 15-Minute Break

ACTION THROUGH EDUCATION

Our efforts for real change against racism.

Learn how we as lawyers can join the fight against racial injustice.

Visit www.utcle.org for more.

1:45 p.m. 1.00 hr

An IRS Scouting Report: Areas of Audit Focus in the Estate Planning Arena

This presentation highlights key, and often surprising, issues of intense IRS audit focus in the estate planning world, identifying trends and outlining strategies to navigate IRS scrutiny.

Michael Barker, McGuireWoods, Richmond, VA

2:45 p.m. 1.50 hrs

Estate Planning Workshop

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.

Moderator:

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

Panelists:

Michael Barker, McGuireWoods, Richmond, VA
Turney P. Berry, Wyatt Tarrant & Combs LLP,
Louisville, KY
Kelly Perez, J.P. Morgan Private Bank, Dallas, TX

4:15 p.m. Adjourn

SUBSCRIBE TODAY!

UT Law CLE offers annual subscriptions for MCLE On-Demand and our eLibrary *Unlimited Access. Anytime. Anywhere.*

Compare options and subscribe at www.utcle.org/subscriptions

***Subscriptions do not include registrations to live conferences or live webcasts.*

Are you a 1st or 2nd year attorney? Attend most UT Law CLE conferences for just \$150!

Call 512.475.6700 to register.

**M
C
L
E**

This course has been approved for Minimum Continuing Legal Education credit by the State Bar of Texas Committee on MCLE in the amount of 6.75 hours. The University of Texas School of Law is a State Bar of California approved MCLE provider (#1944), and an Oklahoma Bar Association MCLE presumptively-approved provider (#169).

HOW TO REGISTER

Online:

www.utcle.org/conferences/ES22/signup

Mail:

The University of Texas
School of Law
ATTN: CLE
PO Box 7759
Austin, TX 78713-7759

Fax:

512.475.6876

Questions? 512.475.6700

If you have dietary requirements or would like to request accommodations under the ADA, please contact Customer Service at 512.475.6700 or service@utcle.org at least 10 days prior to the conference.

REGISTRATION BENEFITS

Comprehensive Course Materials: Access course materials in "Your Briefcase" approximately 48 hours before the live event, and enjoy unlimited access to the final, complete course materials – downloadable PDFs of papers and slides.

Accredited eConference: Complimentary access to the eConference – with papers, slides, and video – accredited for one year in both TX and CA are available in "Your Briefcase" 6–8 weeks after the event.

TX MCLE Credit Reporting: UT Law CLE can report credit on your behalf directly to the State Bar of Texas. Track the Texas MCLE credit reported on your behalf at "Your Account" after you've logged in at www.utcle.org.

TROUBLE LOGGING IN?

A UT Law CLE account is created for conference attendees and product customers with information provided on the order form. An email address will serve as the User Name.

Forget Your Password or Need it Reset? Just select "Forgot Password" under "Sign In or Join" at www.utcle.org.

Still Need Assistance? Contact customer service at 512.475.6700 or service@utcle.org during business hours.

REGISTRATION FORM

PLEASE PRINT CLEARLY

ES22

Bar Card # _____ TX Other State: _____ N/A

Name [Mr. / Ms.] _____

Firm _____

Address _____

City _____ State _____ Zip _____

Telephone _____ Fax _____

Registrant's Email (required) _____

Assistant's Email (optional) _____
Invoices, confirmations, and receipts are emailed to these addresses.

EVENT REGISTRATION

Includes Electronic Course Binder Download (PDF) in "Your Briefcase." Special group registration rates available. Call 512.475.6700.

Live, In-Person Event Registration \$375 | \$425 after November 21

Live Webcast Registration \$375 | \$425 after November 21

Printed and Shipped Binder with Registration (Shipping Included) – Available for order through Friday, December 2, 2022

Please note that the printed binder will arrive 2–3 weeks after the scheduled webcast. Delivery to P.O. boxes is not permitted. Binders will not be distributed on-site.

Printed and Shipped Course Binder \$70.36 (\$65*)

Webcast Add-on

Register for the in-person conference and add on the webcast format for attendance flexibility.

Webcast Add-on \$75

TOTAL EVENT REGISTRATION \$ _____

FIRST AND SECOND YEAR ATTORNEYS MAY ATTEND FOR JUST \$150! CALL 512.475.6700 TO REGISTER.

POST-CONFERENCE PRODUCTS

eConference – For Texas and California MCLE Credit

Includes Electronic Course Binder Download (PDF) and program video/audio. Available 6-8 weeks after live event. Hours may vary depending on actual event runtime.

Individual eConference \$425

Post-Course Binder – For Research and Self-Study

Comprehensive binder with papers and slides, available for delivery 4–6 weeks after live event.

Electronic Post-Course Download (PDF) \$156.96 (\$145*)

Printed Post-Course Binder \$211.09 (\$195*)

TOTAL POST-CONFERENCE PRODUCTS \$ _____

METHOD OF PAYMENT

Check (make check payable to The University of Texas at Austin)

VISA MasterCard American Express P.O. (include a copy of the purchase order upon submission)

Card / P.O. # _____ CW # _____ Exp. Date _____ / _____
(mm/yy)

Authorized Signature _____

** Tax-exempt rate for, e.g., government employees and nonprofits. Include a Texas Sales and Use Tax Exemption Certificate with order.*

Visit

www.utcle.org

Email

service@utcle.org

Call

512.475.6700

 Facebook

UT Law CLE

 LinkedIn

UT-Law-CLE

 Twitter

@UTLawCLE

2022 STANLEY M. JOHANSON
ESTATE PLANNING WORKSHOP

December 2, 2022 ■ DoubleTree by Hilton Hotel Austin ■ Austin, Texas

NON-PROFIT-ORG
U.S. Postage
PAID
U T School of Law

AUSTIN

December 2, 2022

CONFERENCE LOCATION



DoubleTree by Hilton Hotel Austin

6505 N. Interstate 35
Austin, TX 78752-4346
512-454-3737
800-866-3126 (reservations)

Special Room Rate: \$140

good through November 8, 2022
reference "UT Taxation and Estate
Planning Conference"
(subject to availability)

(subject to availability) Parking:

Daily or Overnight Self-parking: \$10
Daily Valet Parking: \$25

KEY DATES

November 21, 2022

Last day for early registration rates

November 22, 2022

Last day for full refund cancellation

November 28, 2022

Last day for partial refund cancellation
\$50 processing fee applied

December 2, 2022

Workshop begins

December 2, 2022

*Last day to order a printed and shipped course binder
with in-person or webcast conference registration.*

THANK YOU FOR YOUR SUPPORT!

WORKSHOP SPONSOR

Frost Wealth Advisors

WORKSHOP FACULTY AND PLANNING COMMITTEE

STEPHEN R. AKERS*—CO-CHAIR
Bessemer Trust
Dallas, TX

MICKEY R. DAVIS*—CO-CHAIR
Davis & Willms, PLLC
Houston, TX

STANLEY M. JOHANSON*—CHAIR EMERITUS
The University of Texas School of Law
Austin, TX

MICHAEL BARKER
McGuireWoods
Richmond, VA

TURNERY P. BERRY
Wyatt Tarrant & Combs LLP
Louisville, KY

CLEVELAND G. CLINTON
Gray Reed
Dallas, TX

LEVI M. DILLON
Bourland, Wall, & Wenzel, P.C.
Fort Worth, TX

KELLY PEREZ
J.P. Morgan Private Bank
Dallas, TX

GREGORY W. SAMPSON
Gray Reed
Dallas, TX

*Planning Committee member

UT Law CLE is committed to Practice Excellence.

We are here to support our community while we navigate the coronavirus pandemic together. Information and updates regarding our in-person conferences and live webcasts will be posted at www.utcle.org.

In addition, we continue to offer multiple educational opportunities online—both live and on-demand—by bringing practitioners together virtually. We are fortunate to serve so many of you who strive for excellence in the practice of law.

