

2023 Stanley M. Johanson Estate Planning Workshop
December 15, 2023 • AT&T Conference Center • Austin, TX
December 15, 2023 • Live Webcast

Friday Morning, Dec. 15, 2023

Presiding Officer:

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

7:30 am In Austin Only	<p>Registration Opens</p> <p>Includes continental breakfast.</p>
8:20 am	<p>Welcoming Remarks</p>
8:30 am 1.25 hrs	<p>Recent Developments Affecting Estate Planning</p> <p>Discuss the highlights of planning implications of recent federal cases, rulings, important proposed regulations, and legislative developments that affect our estate planning clients.</p> <p>Howard M. Zaritsky, Rapidan, VA</p>
9:45 am	<p>15-Minute Break</p>
10:00 am 1.00 hr	<p>REPTL, Meet T-REP. T-REP, Meet REPTL: The 2023 Texas Estate and Trust Legislative Update</p> <p>Explore the latest recent Texas legislation affecting decedents' estates, guardianships, trusts, powers of attorney, and other related matters.</p> <p>Lauren Davis Hunt, Osborne, Helman, Scott, Knisely & Stanton L.L.P. - Austin, TX</p>
11:00 am 1.00 hr	<p>Estate Planning for Ranch Owners</p> <p>Does your ranch-owning client plan to liquidate it at death or keep it in the family for generations to come? Learn key planning ideas to deal with this Texas estate planning icon.</p> <p>Tanya E. Feinleib, Langley and Banack, Inc. - San Antonio, TX</p>
12:00 pm In Austin Only	<p>Pick Up Lunch (in Austin)</p> <p>Included in registration.</p>

Friday Afternoon, Dec. 15, 2023

Presiding Officer:

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

LUNCHEON PRESENTATION

12:30 pm
1.00 hr

Estate Planning Over Seven Decades

Hear how the estate planning practice and teaching estate planning to law students has changed (or in some cases not changed) through the eyes and ears of a Texas estate planning institution, Professor Stanley M. Johanson.

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

1:30 pm

15-Minute Break

1:45 pm
1.00 hr

What You Need to Know About the Corporate Transparency Act

Starting next year, the Corporate Transparency Act will require virtually every business entity formed or registered to do business in the U.S. to provide information about the people who ultimately own or control the entity. Be prepared to help your clients (and yourself!) comply with this important legislation.

John R. Strohmeyer, Strohmeyer Law PLLC - Houston, TX

2:45 pm
1.50 hrs

Estate Planning Workshop

The panel addresses practical concerns commonly faced by practitioners in the estate planning area, including hot-button issues stemming from 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:

Stephen R. Akers, Bessemer Trust - Dallas, TX

Mickey R. Davis, Davis & Willms, PLLC - Houston, TX

Tanya E. Feinleib, Langley and Banack, Inc. - San Antonio, TX

John R. Strohmeyer, Strohmeyer Law PLLC - Houston, TX

Howard M. Zaritsky, Rapidan, VA

4:15 pm

Adjourn