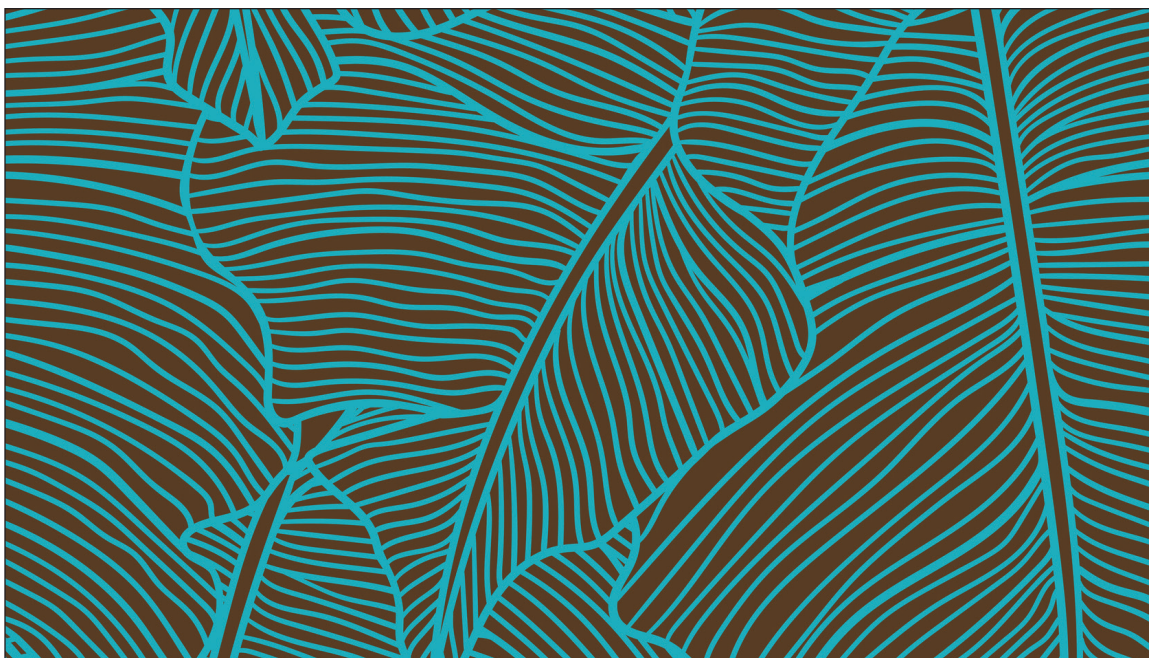


2024 STANLEY M. JOHANSON  
**ESTATE PLANNING WORKSHOP**



December 6, 2024  
AT&T Conference Center ■ Austin, Texas

---

 Live Webcast December 6

---

Earn up to 6.75 Hours of Credit (Expected)

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

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

TX and National Accounting CPE Credit Available  
NASBA Credit Available for In-Person Conference Only

2024 STANLEY M. JOHANSON  
**ESTATE PLANNING WORKSHOP**

December 6, 2024 ■ AT&T Conference Center ■ Austin, Texas

Earn up to 6.75 Hours of Credit (Expected)

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 Credit Available

NASBA Credit Available for In-Person Conference Only

*Times listed are in Central Time*

**FRIDAY MORNING, DEC. 6, 2024**

**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**

Highlight planning implications of recent federal cases, rulings, important proposed regulations, and legislative developments that affect our estate planning clients.

Charles A. "Clary" Redd, Stinson LLP, St. Louis, MO

**9:45 a.m. 15-Minute Break**

**10:00 a.m. 2.00 hrs**

**Estate Planning for Modest Estates: Practical Tools Every Planner Should Know**

Everyone is mortal but not everyone has an ultra-high net worth. Rummage through the estate planning toolbox and review core techniques to use regardless of your clients' financial situation. Examine practical strategies, tools, and techniques essential for clients who don't need to worry about estate taxes (but that wealthy clients will appreciate too!).

Mickey R. Davis, Davis & Willms, PLLC, Houston, TX  
Melissa J. Willms, Davis & Willms, PLLC, Houston, TX

**12:00 p.m. Pick Up Lunch**

Included in registration.

**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).

**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**

**Lifetime Planning with QTIP Trusts**

Helping a surviving spouse utilize the assets held inside a qualified terminable interest property ("QTIP") trust can present unique opportunities but it is not without significant obstacles. Hear the latest on this important planning area, including updates from the Tax Court in the *Anenberg* and *McDougall* cases.

Keri D. Brown, Baker Botts LLP, Houston, TX

**1:30 p.m. 15-Minute Break**

**1:45 p.m. 1.00 hr**

**Oil & Gas in Estate Planning and Probate**

Mineral ownership may be common for many Texans, but the complexity in estate planning and probate with mineral interests can be a minefield of potential pitfalls for the unwary practitioner. Understand important issues to consider when providing estate planning advice to owners of various mineral interests, and when administering the estates of people who owned them.

R. Shaun Rainey, Cotton, Bledsoe, Tighe & Dawson, PC, Midland, TX

**2:45 p.m.**

**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  
Keri D. Brown, Baker Botts LLP, Houston, TX  
Mickey R. Davis, Davis & Willms, PLLC, Houston, TX  
R. Shaun Rainey, Cotton, Bledsoe, Tighe & Dawson, PC, Midland, TX  
Charles A. "Clary" Redd, Stinson LLP, St. Louis, MO  
Melissa J. Willms, Davis & Willms, PLLC, Houston, 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](http://www.utcle.org/subscriptions)

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

**Are you a 1<sup>st</sup> or 2<sup>nd</sup> year attorney? Attend most UT Law CLE conferences for just \$195!**

**Call 512.475.6700 to register.**

## HOW TO REGISTER

### Online:

www.utcle.org/conferences/ES24/signup

### Mail:

The University of Texas  
School of Law  
ATTN: CLE  
P.O. Box 12883  
Austin, TX 78711

### 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

ES24

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 . . . . . \$475  
 Live Webcast Registration . . . . . \$475

**Printed and Shipped Binder with Registration (Shipping Included)** – Available for order through Friday, December 6, 2024

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

- Printed and Shipped Course Binder . . . . . \$81.19 (\$75\*)

### 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 \$195! 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 . . . . . \$525

#### 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) . . . . . \$297.69 (\$275\*)  
 Printed Post-Course Binder . . . . . \$351.81 (\$325\*)

**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](http://www.utcle.org)Email  
[service@utcle.org](mailto:service@utcle.org)Call  
**512.475.6700** Facebook  
**UT Law CLE** LinkedIn  
**UT-Law-CLE** X  
**@UTLawCLE** YouTube  
**@utlawcle8597****2024 STANLEY M. JOHANSON  
ESTATE PLANNING WORKSHOP**

December 6, 2024 ■ AT&amp;T Conference Center ■ Austin, Texas

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

ES24

**AUSTIN****December 6, 2024****CONFERENCE LOCATION****AT&T Conference Center**The University of Texas at Austin  
1900 University Avenue  
Austin, TX 78705  
877.744.8822 (reservations)**Special Room Rate: \$204**good through November 4, 2024  
reference "UT Estate Planning Conference"  
(subject to availability)**Parking:**Please visit [www.utcle.org/conferences/ES24](http://www.utcle.org/conferences/ES24)  
for daily and overnight rates**KEY DATES****November 22, 2024***Last day for full refund cancellation***November 25, 2024***Last day for partial refund cancellation*  
\$50 processing fee applied**December 6, 8:20 a.m., CT***Conference begins***December 6, 2024***Last day to order a printed and shipped course binder  
with in-person or webcast conference registration.***WORKSHOP FACULTY AND PLANNING COMMITTEE**

STEPHEN R. AKERS\*—CO-CHAIR

Bessemer Trust  
Dallas, TX

R. SHAUN RAINEY

Cotton, Bledsoe, Tighe & Dawson, PC  
Midland, TX

MICKEY R. DAVIS\*—CO-CHAIR

Davis & Willms, PLLC  
Houston, TX

CHARLES A. "CLARY" REDD

Stinson LLP  
St. Louis, MO

STANLEY M. JOHANSON\*—CHAIR EMERITUS

The University of Texas School of Law  
Austin, TX

MELISSA J. WILLMS

Davis & Willms, PLLC  
Houston, TX

KERI D. BROWN

Baker Botts LLP  
Houston, TX

\*Planning Committee member

**UT Law CLE is committed to  
Practice Excellence.**We are here to support our community. Information and  
updates regarding our in-person conferences and live webcasts  
will be posted at [www.utcle.org](http://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.