

2024 Stanley M. Johanson Estate Planning Workshop
December 6, 2024 • AT&T Conference Center • Austin, TX
December 6, 2024 • Live Webcast

Friday Morning, Dec. 6, 2024

Presiding Officer:

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

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| 7:30 am In Austin Only | Registration Opens Includes continental breakfast. |
| 8:20 am | Welcoming Remarks |
| 8:30 am 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 am | 15-Minute Break |
| 10:00 am 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 pm In Austin Only | Pick Up Lunch (in Austin) Included in registration. |

Friday Afternoon, Dec. 6, 2024

Presiding Officer:

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

LUNCHEON PRESENTATION

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| <p>12:30 pm 1.00 hr</p> | <p>Lifetime Planning with QTIP Trusts</p> <p>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 <i>Anenberg</i> and <i>McDougall</i> cases.</p> <p>Keri D. Brown, Baker Botts LLP - Houston, TX</p> |
| <p>1:30 pm</p> | <p>15-Minute Break</p> |
| <p>1:45 pm 1.00 hr</p> | <p>Oil & Gas in Estate Planning and Probate</p> <p>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.</p> <p>R. Shaun Rainey, Cotton, Bledsoe, Tighe & Dawson, PC - Midland, TX</p> |
| <p>2:45 pm 1.50 hrs</p> | <p>Estate Planning Workshop</p> <p>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.</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 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</p> |
| <p>4:15 pm</p> | <p>Adjourn</p> |