UT LAW CLE Continuing Legal Education

2026 Stanley M. Johanson Estate Planning Workshop
December 4, 2026 • AT&T Conference Center • Austin, TX
December 4, 2026 • Live Webcast

Friday Morning, Dec. 4, 2026

Presiding Officer:
Stephen R. Akers, Bessemer Trust - Dallas, TX

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	**Anatomy of a Will** Most lawyers think that they can draft a Will, but Wills are an intricate document that represents the largest financial transaction of a client's life. Review not only the elements of a well-drafted Will, but the essential components one needs to ensure that your clients' wishes are fulfilled and estate administrations run smoothly. Bernard E. "Barney" Jones, Attorney at Law - Houston, TX
12:00 pm In Austin Only	**Pick Up Lunch (in Austin)** Included in registration.

Friday Afternoon, Dec. 4, 2026

Presiding Officer:
Mickey R. Davis, Davis & Willms, PLLC - Houston, TX

LUNCHEON PRESENTATION

12:30 pm 1.00 hr	**AI Prompting Techniques** AI is everywhere! We have all heard stories of the great promise and dangers of using artificial intelligence in your practice. It isn't a matter of whether you'll use AI in your practice; it's just a matter of when. Getting the most from AI is largely depending not only on the questions you ask, but on how you

	ask them. Learn the best strategies to make AI work for you and give you results that are accurate and dependable. Julia Jonas, Karisch Jonas Law, PLLC - Austin, TX
1:30 pm	**15-Minute Break**
1:45 pm 1.00 hr	**Apportionment and Allocation of Federal Estate Taxes** Tax apportionment rules (whether default or customized) governing the allocation of transfer taxes among beneficiaries are a critical yet often overlooked part of an estate plan. Tax apportionment, sometimes described as an "ungift," is just as important as the bequests made in the Will. Hone your apportionment skills to ensure that your documents provide an equitable distribution of assets among beneficiaries. Katherine J. Dickinson, Troutman Pepper Locke - Houston, TX
2:45 pm 1.50 hrs	**Estate Planning Workshop** Address 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: Mickey R. Davis, Davis & Willms, PLLC - Houston, TX Panelists: Stephen R. Akers, Bessemer Trust - Dallas, TX Katherine J. Dickinson, Troutman Pepper Locke - Houston, TX Stanley M. Johanson, The University of Texas School of Law - Austin, TX Bernard E. "Barney" Jones, Attorney at Law - Houston, TX Charles A. "Clary" Redd, Stinson LLP - St. Louis, MO
4:15 pm	**Adjourn**