UT LAW CLE Continuing Legal Education

eConference

2025 Stanley M. Johanson Estate Planning eConference

Session 1 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. **Nikola "Nick" Djuric,** Bessemer Trust - Atlanta, GA
Session 2 1.00 hr	**The 2025 Texas Estate and Trust Legislative Update** Learn the latest about recent Texas legislation affecting decedents' estates, guardianships, trusts, powers of attorney, and other related matters. **Meredith McIver,** Ytterberg Deery Knull LLP - Austin, TX
Session 3 1.00 hr	**How to Be an Excellent Trustee** Being a trustee involves more than knowing how to invest funds, make distributions, and keep records. Learn the skills that every trustee should know, not just to fulfill fiduciary duties, but to develop and maintain excellent relationships with trust beneficiaries. **Bryan Phillips,** Ytterberg Deery Knull LLP - Houston, TX
Session 4 1.00 hr	**Top 10 Considerations for Avoiding Litigation for the Estate Planner** While the risk of being involved in litigation for an estate planner can never be eliminated, careful consideration of the client's capacity and current family situation, the work necessary, and the other issues can reduce the risk. Learn the top 10 tips to keep your estate plan (and you) out of the fire. **Pamela D. Orsak,** The Law Office of Pamela D. Orsak - Victoria, TX
Session 5 1.00 hr	**Estate Planning for Real Estate Investors** Focus on the income tax and wealth transfer tax planning opportunities (and pitfalls) associated with planning for real estate investors including a discussion of non-tax considerations and obstacles. Also explore planning strategies for specific types of assets and ownership structures typically found in real estate deals. **Farhad Aghdami,** Williams Mullen - Richmond, VA

Session 6 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. **Stanley M. Johanson,** The University of Texas School of Law - Austin, TX **Farhad Aghdami,** Williams Mullen - Richmond, VA **Stephen R. Akers,** Bessemer Trust - Dallas, TX **Mickey R. Davis,** Davis & Willms, PLLC - Houston, TX **Nikola "Nick" Djuric,** Bessemer Trust - Atlanta, GA **Meredith McIver,** Ytterberg Deery Knull LLP - Austin, TX **Bryan Phillips,** Ytterberg Deery Knull LLP - Houston, TX