2013 Stanley M. Johanson Estate Planning Workshop
December 6, 2013 • AT&T Conference Center • Austin, TX

Friday Morning, Dec. 6, 2013

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

7:30 am	**Registration Opens** Includes continental breakfast.
8:15 am	**Welcoming Remarks**
8:30 am 1.25 hrs	**Recent Developments Affecting Estate Planning** Recent cases, regulations and rulings related to valuation issues, family limited partnerships, marital and charitable deductions, administration expense deductions, IRAs, and other "hot" estate planning topics. Stanley M. Johanson, The University of Texas School of Law - Austin, TX
9:45 am	**Break**
10:00 am 1.00 hr 0.25 hr ethics	**Untying the *Windsor* Knot** The Supreme Court's decision that it is unconstitutional to treat legally married same sex couples differently for federal law purposes set off a revolution in how such couples are treated, but left many questions unanswered. An analysis of the effects of the *Windsor* decision through its progeny and government agency pronouncements, and the profound conflicts it now creates between Texas law and federal law. Alvin J. Golden, Ikard Golden Jones P.C. - Austin, TX
11:00 am 1.00 hr	**A Comprehensive Approach to Asset Protection Planning** Practical considerations for creditor protection planning using traditional estate planning strategies. Discussion of LLCs, partnerships, third party and self-settled trusts, forum shopping and drafting tips for formation agreements to protect family wealth and limit creditor actions. Review of recent case law and legislation, including a discussion of fraudulent transfers and related issues involving asset protection planning. Mark E. Osborne, Osborne, Helman, Knebel & Deleery, L.L.P. - Austin, TX
12:00 pm	**Pick Up Lunch** Included in registration.

Friday Afternoon, Dec. 6, 2013

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

Luncheon Presentation

12:15 pm 0.75 hr	**With Apologies to David Letterman, The Top Twenty (or so) List of Estate Planning Insurance Mistakes—And How to Avoid (or at Least Fix) Them** Identify common mistakes in life insurance planning in an estate planning context, and hear suggestions on how to avoid them. Lawrence Brody, Bryan Cave LLP - Saint Louis, MO

1:00 pm	**Break**
1:15 pm 1.00 hr	**Trust and Estate Planning in a High-Exemption World and the 3.8% "Medicare" Tax: What Estate and Trust Professionals Need to Know** With new “permanent” estate and gift tax laws, planning techniques continue to evolve as estate planning professionals and their clients adapt. Explore the new rules, along with some new twists, as we reevaluate estate planning tools while wrestling with issues like portability and the 3.8% net investment income tax. Mickey R. Davis, Davis & Willms, PLLC - Houston, TX Melissa J. Willms, Davis & Willms, PLLC - Houston, TX
2:15 pm	**Break**
2:30 pm 1.50 hrs 0.75 hr ethics	**Estate Planning Workshop** The Workshop addresses practical and ethical concerns commonly faced by practitioners in the estate planning area, covering hot-button issues stemming from recent cases, rulings and regulations (final and proposed). Gain insight on current "hot" estate planning techniques. Moderator: Stanley M. Johanson, The University of Texas School of Law - Austin, TX Panelists: Lawrence Brody, Bryan Cave LLP - Saint Louis, MO Mickey R. Davis, Davis & Willms, PLLC - Houston, TX Alvin J. Golden, Ikard Golden Jones P.C. - Austin, TX Jerome M. Hesch, Of Counsel, Berger Singerman LLP - Miami, FL Mark E. Osborne, Osborne, Helman, Knebel & Deleery, L.L.P. - Austin, TX Melissa J. Willms, Davis & Willms, PLLC - Houston, TX
4:00 pm	**Adjourn**