

2023 STANLEY M. JOHANSON
ESTATE PLANNING WORKSHOP



December 15, 2023
AT&T Conference Center ■ Austin, Texas

 **Live Webcast December 15**

Earn up to 6.75 Hours of Credit

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 and Certified Financial Planner (CFP) Credit Available
NASBA Credit Available for In-Person Conference Only

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Times listed are in Central Time

FRIDAY MORNING, DEC. 15, 2023

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

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

Howard M. Zaritsky, Rapidan, VA

9:45 a.m. 15-Minute Break

10:00 a.m. 1.00 hr

REPTL, Meet T-REP. T-REP, Meet REPTL: The 2023 Texas Estate and Trust Legislative Update

Explore the latest recent Texas legislation affecting decedents' estates, guardianships, trusts, powers of attorney, and other related matters.

Lauren Davis Hunt, Osborne, Helman, Scott, Knisely & Stanton L.L.P., Austin, TX

11:00 a.m. 1.00 hr

Estate Planning for Ranch Owners

Does your ranch-owning client plan to liquidate it at death or keep it in the family for generations to come? Learn key planning ideas to deal with this Texas estate planning icon.

Tanya E. Feinleib, Langley and Banack, Inc., San Antonio, TX

12:00 p.m. Pick Up Lunch

Included in registration.

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

Estate Planning Over Seven Decades

Hear how the estate planning practice and teaching estate planning to law students has changed (or in some cases not changed) through the eyes and ears of a Texas estate planning institution, Professor Stanley M. Johanson.

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

1:30 p.m. 15-Minute Break

1:45 p.m. 1.00 hr

What You Need to Know About the Corporate Transparency Act

Starting next year, the Corporate Transparency Act will require virtually every business entity formed or registered to do business in the U.S. to provide information about the people who ultimately own or control the entity. Be prepared to help your clients (and yourself!) comply with this important legislation.

John Strohmeyer, Strohmeyer Law PLLC, Houston, TX

**M
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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).

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
Mickey R. Davis, Davis & Willms, PLLC, Houston, TX
Tanya E. Feinleib, Langley and Banack, Inc., San Antonio, TX
John Strohmeyer, Strohmeyer Law PLLC, Houston, TX
Howard M. Zaritsky, Rapidan, VA

4:15 p.m. Adjourn

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512.475.6876

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Printed and Shipped Binder with Registration (Shipping Included) – Available for order through Friday, December 15, 2023

Please note that the printed binder will arrive 2–3 weeks after the scheduled webcast. 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

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Printed Post-Course Binder \$243.56 (\$225*)

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Check (make check payable to The University of Texas at Austin)

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1900 University Avenue
Austin, TX 78705
877.744.8822 (reservations)**Special Room Rate: \$199**good through November 12, 2023
reference "UT Taxation and Estate
Planning Conference"
(subject to availability)**Parking:**Please visit www.utcle.org/conferences/ES23
for daily and overnight rates**KEY DATES****November 29, 2023***Last day for early registration rates***December 6, 2023***Last day for full refund cancellation***December 8, 2023***Last day for partial refund cancellation*
\$50 processing fee applied**December 15, 2023, 8:20 a.m., CT***Conference begins***December 15, 2023***Last day to order a printed and shipped course binder
with in-person or webcast conference registration.***WORKSHOP FACULTY AND PLANNING COMMITTEE**

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