



THE CENTER FOR AMERICAN
AND INTERNATIONAL LAW

Short Course on Estate Planning

53rd Annual Program



53rd Annual Program
**Short Course
on Estate Planning**

January 31 - February 2, 2018

The Center for American
and International Law
Plano, Texas

Register Now! cailaw.org

Register before January 16 to receive a discount!

Program Co-Chairs

| Michael V. Bourland | Darin N. Digby

Co-Chair Emeritus

| Santo Bisignano, Jr.

Featured Presenters

| Professor Stanley M. Johanson | Melissa J. Willms
| Stephen R. Akers | Megan C. Sanders
| Alvin J. Golden | John K. Round

MCLE and CPE credit will be available.

53rd Annual Program: Short Course on Estate Planning

SCHEDULE

January 31 - February 2

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Michael V. Bourland

Bourland, Wall & Wenzel, P.C.

Darin N. Digby

Schoenbaum, Curphy & Scanlan, P.C.

Co-Chair Emeritus

Santo Bisignano, Jr.

Bisignano Harrison Neuhoﬀ LLP

WEDNESDAY, JANUARY 31

8:30	REGISTRATION AND CONTINENTAL BREAKFAST
9:00	BASIC PRINCIPLES AND STRATEGIES IN ESTATE PLANNING (1.25 hr) — Professor Stanley M. Johanson , James A. Elkins Centennial Chair in Law, University Distinguished Teaching Professor, The University of Texas School of Law, Austin, Texas
10:15	BREAK
10:30	BASIC PRINCIPLES AND STRATEGIES IN ESTATE PLANNING, CONT. (1.75 hrs) — Professor Johanson
12:15	LUNCH PROVIDED
1:15	QUALIFIED PLAN BENEFITS AND IRA'S IN ESTATE PLANNING (1.5 hrs) — Professor Johanson
2:45	BREAK
3:00	MARITAL DEDUCTION PLANNING & PORTABILITY (2 hrs) — Alvin J. Golden , Brink Bennett Flaherty Golden pllc, Austin, Texas
5:00	RECESS AND NETWORKING RECEPTION

THURSDAY, FEBRUARY 1

8:30	ESTATE PLANNING ETHICS (1 hr ethics) — Michael V. Bourland , Bourland, Wall & Wenzel, P.C., Fort Worth, Texas — Darin N. Digby , Schoenbaum, Curphy & Scanlan, P.C., San Antonio, Texas
9:30	BREAK
9:45	INCOME TAXATION OF TRUSTS AND ESTATES (2 hrs) — Melissa J. Willms , Davis & Willms, PLLC, Houston, Texas
11:45	LUNCH PROVIDED

12:00	LUNCH PRESENTATION: PRIMER ON CHARITABLE PLANNING (1 hr) — Megan C. Sanders , Bourland, Wall & Wenzel, P.C., Fort Worth, Texas
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1:00 BREAK

1:15	PLANNING FOR THE FAMILY BUSINESS, INCLUDING FAMILY LIMITED PARTNERSHIPS (FLPS); WORKING WITH A CLIENT CLOSING A BUSINESS ENTITY (1 hr) — Mr. Bourland
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2:15 BREAK

2:30	TRANSFER PLANNING (Time includes a 15 minute break) (2.25 hrs) — Mr. Digby
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5:00 RECESS

FRIDAY, FEBRUARY 2

8:30	HOT TOPICS IN ESTATE PLANNING (2 hrs) — Stephen R. Akers , Bessemer Trust Company, Dallas, Texas
10:30	BREAK
10:45	LIFE INSURANCE PLANNING AND IRREVOCABLE LIFE INSURANCE TRUSTS (1 hr) — John K. Round , Strasburger & Price, LLP, Frisco, Texas
11:45	LUNCH PROVIDED
12:00	GIFTING TECHNIQUES AND AN OVERVIEW OF THE GENERATION-SKIPPING TRANSFER TAX (2 hrs) — Mr. Digby
2:00	BREAK
2:15	GENERATION-SKIPPING, CONT. (.75 hr) — Mr. Digby
3:00	POST-MORTEM PLANNING (1 hr) — Mr. Digby
4:00	ADJOURN

Luncheon Sponsor



In-Kind Sponsor



REGISTRATION

53rd Annual Program Short Course on Estate Planning

January 31 - February 2, 2018
at The Center for American and International Law
Plano, Texas

Registration includes the conference, course materials, continental breakfasts, lunches and a reception.

Multiple Registrants from the same organization: Please contact Lisa for special pricing for tuition levels exceeding \$750 - lgaspar@cailaw.org or 972.244.3404.

Check applicable box:	Received by 1/16/18	Received after 1/16/18
Regular registration fee	<input type="checkbox"/> \$1275	<input type="checkbox"/> \$1375
CAIL Member or Member Employee	<input type="checkbox"/> \$1125	<input type="checkbox"/> \$1225
Government / Non-Profit / Academic Employee	<input type="checkbox"/> \$1175	<input type="checkbox"/> \$1275
Attorneys, CFPs, CPAs and Trust Officers Licensed/Employed 3 Years or Less	<input type="checkbox"/> \$650	<input type="checkbox"/> \$750
U.S. Law Student (J.D.)	<input type="checkbox"/> \$300	<input type="checkbox"/> \$400
Materials Only, I cannot attend	<input type="checkbox"/> \$650	<input type="checkbox"/> \$750

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credit card only
www.cailaw.org

FAX

credit card only
972.244.3401

MAIL

check or credit card
The Center for American and
International Law
5201 Democracy Drive,
Plano, TX USA 75024

PHONE

credit card only
972.244.3404 or 800.409.1090
8:30am-5:00pm CT

PAYMENT MUST ACCOMPANY REGISTRATION

GENERAL INFORMATION

WHO SHOULD ATTEND: The new lawyer, CPA, financial planner and trust officer whose primary career focus requires a thorough knowledge of estate planning. This is also a great program for the experienced lawyer who wants to be reintroduced to the estate planning profession.

CANCELLATION POLICY: Tuition, less a \$50 cancellation fee, will be refunded upon receipt of written cancellation received by January 16, 2018. E-mail cancellation notice to lgaspar@cailaw.org. After this date, no refunds, but substitution of attendees for this program will be permitted. Registrants not entitled to a refund will receive the course materials.

HOUSING: Rooms (in limited number) have been reserved at the Hyatt Place Plano, 3100 Dallas Pkwy, Plano, Texas 75093. Registrants should call 888-492-8847 or 972.378.3997 and mention "CAIL Estate Planning" or use booking code G-CW15 when registering online. The last day to receive a special room rate of \$100 + tax is January 16, 2018.

NONDISCRIMINATION POLICY: CAIL does not discriminate on the basis of race, color, sex, religion, national origin, age, disability, veteran status or any other protected status in educational activities, scholarship programs or admissions.

MCLE CREDIT: This program is approved by the State Bar of Texas for 20.5 hours, including 1 hour of ethics. Course ID Number: 928014111. Credit hours for other states will vary and are subject to each state's approval and credit rounding rules.

For this conference, CAIL will directly apply (if requested) for course accreditation in the following states: California, Minnesota, New Mexico, Ohio, Oklahoma, Pennsylvania, Texas and Virginia. Some of these states may not approve a program for credit hours before the program occurs. Attorneys may be eligible to receive CLE credit through reciprocity or attorney self-submission in other states. CAIL conferences are typically accredited by all mandatory CLE states.

SPECIALIZATION CREDIT: This program is approved by the Texas Board of Legal Specialization for 20.5 hours in the following areas: Estate Planning and Probate Law and Tax Law.

CPA CREDIT: CPA's will receive 24.6 hours of CPE credit, no ethics. A sign-in sheet will be available at the conference. Certificates will be e-mailed.



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AND INTERNATIONAL LAW**

**53RD ANNUAL PROGRAM
SHORT COURSE ON ESTATE PLANNING**
The Center for American and International Law
5201 Democracy Drive
Plano, TX USA 75024

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Dallas, Texas

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