



THE CENTER FOR AMERICAN
AND INTERNATIONAL LAW



2020
1/29 - 1/31

55th Annual Program Short Course on Estate Planning

THE CENTER FOR AMERICAN AND
INTERNATIONAL LAW
PLANO, TEXAS, USA

Highlights: Basic Principles & Hot
Topics in Estate Planning

MCLE and CPE credit will be available.

Program Co-Chairs

- Michael V. Bourland
- Darin N. Digby

Featured Presenters

- Professor Stanley M. Johanson
- Stephen R. Akers
- Melissa J. Willms
- Megan C. Sanders
- John K. Round
- Kristin L. Brown

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SCHEDULE

Program Co-Chairs

Michael V. Bourland

Bourland, Wall & Wenzel, P.C.

Darin N. Digby

Schoenbaum, Curphy & Scanlan, P.C.

This annual program is designed for the new lawyer, CPA, financial planner and trust officer whose primary career focus requires a thorough knowledge of complex estate and tax planning. It is also a great program for experienced lawyers wanting a refresher on estate planning. Be prepared for three intense days of lectures—this is not a forms course!

WEDNESDAY, JANUARY 29

8:30	REGISTRATION AND CONTINENTAL BREAKFAST
9:00	BASIC PRINCIPLES AND STRATEGIES IN ESTATE PLANNING (1.25 hr, includes .25 hr Ethics) <ul style="list-style-type: none"> • 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 hr) <ul style="list-style-type: none"> • Professor Johanson
11:30	BREAK
11:45	BASIC PRINCIPLES AND STRATEGIES IN ESTATE PLANNING, CONT. (.75 hr)
12:30	LUNCH PROVIDED
1:30	QUALIFIED PLAN BENEFITS AND IRAS IN ESTATE PLANNING (1.5 hrs) <ul style="list-style-type: none"> • Professor Johanson
3:00	BREAK
3:15	MARITAL DEDUCTION PLANNING & PORTABILITY (1 hr) <ul style="list-style-type: none"> • Kristin L. Brown, Davis Stephenson PLLC, Dallas, Texas
4:15	BREAK
4:30	MARITAL DEDUCTION PLANNING & PORTABILITY, CONT. (1 hr)
5:30	RECESS AND NETWORKING RECEPTION

THURSDAY, JANUARY 30

8:30	ESTATE PLANNING ETHICS (1 hr ethics) <ul style="list-style-type: none"> • 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 (1 hr) <ul style="list-style-type: none"> • Melissa J. Willms, Davis & Willms, PLLC, Houston, Texas
10:45	BREAK
11:00	INCOME TAXATION OF TRUSTS AND ESTATES, CONT. (1 hr)
12:00	LUNCH PROVIDED
12:15	LUNCH PRESENTATION: PRIMER ON CHARITABLE PLANNING (1 hr) <ul style="list-style-type: none"> • Megan C. Sanders, Bourland, Wall & Wenzel, P.C., Fort Worth, Texas
1:15	BREAK
1:30	PLANNING FOR THE FAMILY BUSINESS, INCLUDING FAMILY LIMITED PARTNERSHIPS (FLPS); WORKING WITH A CLIENT CLOSING A BUSINESS ENTITY (1 hr) <ul style="list-style-type: none"> • Mr. Bourland
2:30	BREAK
2:45	TRANSFER PLANNING (1 hr) <ul style="list-style-type: none"> • Mr. Digby
3:45	BREAK
4:00	TRANSFER PLANNING, CONT. (1.25 hr)
5:15	RECESS

FRIDAY, JANUARY 31

8:30	HOT TOPICS IN ESTATE PLANNING (2 hrs) <ul style="list-style-type: none"> • Stephen R. Akers, Bessemer Trust Company, Dallas, Texas
10:30	BREAK
10:45	IRREVOCABLE TRUSTS WITH EMPHASIS ON LIFE INSURANCE PLANNING (1 hr) <ul style="list-style-type: none"> • John K. Round, Clark Hill Strasburger, Frisco, Texas
11:45	LUNCH PROVIDED
12:00	GIFTING TECHNIQUES AND AN OVERVIEW OF THE GENERATION-SKIPPING TRANSFER TAX (1 hr) <ul style="list-style-type: none"> • Mr. Digby
1:00	BREAK
1:15	GENERATION-SKIPPING, CONT. (1 hr)
2:15	BREAK
2:30	GENERATION-SKIPPING, CONT. (.75 hr)
3:15	POST-MORTEM PLANNING (.75 hr) <ul style="list-style-type: none"> • Mr. Digby
4:00	ADJOURN

Conference Sponsor



In-Kind Sponsor



REGISTRATION

55TH ANNUAL PROGRAM SHORT COURSE ON ESTATE PLANNING

January 29 - 31, 2020

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 1/15/20	Received after 1/15/20
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 Employee	<input type="checkbox"/> \$1175	<input type="checkbox"/> \$1275
Non-Profit Employee	<input type="checkbox"/> \$1175	<input type="checkbox"/> \$1275
Academic Employee	<input type="checkbox"/> \$1175	<input type="checkbox"/> \$1275
Attorneys, CFPs, CPAs, Paralegals, and, Trust Officers Licensed/Employed 3 Years or Less in This Practice Area	<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>I Cannot Attend</i>	<input type="checkbox"/> \$650	<input type="checkbox"/> \$750

REGISTRATION ROSTER: Your name & contact information will be included on the Registration Roster, unless you indicate otherwise below.

- Include only my name & employer/company's name on the roster.
- Do not include my name & contact information on the roster

Name _____

Firm/Company/Organization _____

Address _____

City, State, Postal Code, Country _____

Phone _____ Fax _____

Email _____

PAYMENT INFORMATION

Check enclosed payable to: The Center for American and International Law

Credit Card: Mastercard Visa AMEX Discover

Card number _____ Exp date _____ CSC _____

Name on card _____

Billing address (if different than above address) _____

Signature _____

GENERAL INFORMATION

CANCELLATION POLICY: Tuition, less a \$50 cancellation fee, will be refunded upon receipt of written cancellation received by January 15, 2020. 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.

OVERNIGHT ACCOMMODATIONS: Rooms (in very limited number) are available at the Hyatt Place Dallas/Plano, 3100 Dallas Parkway, Plano, TX 75093. Registrants should call 972.378.3997 to book a reservation and reference CAIL - Estate Planning (Booking code: G-CLAW) to receive a reduced room rate of \$105 + tax/night. The last day to obtain this special rate is January 15, 2020.

NONDISCRIMINATION POLICY: The Center for American and International Law 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.

PRIVACY POLICY: We do not sell or rent information to any outside parties. By providing your information, you will receive postal and electronic communications from The Center for American and International Law (CAIL) in accordance with CAIL's Privacy Policy. At any point, you can opt-out or unsubscribe by selecting either link at the bottom of each email or call us at 972.244.3400.

MCLE CREDIT: This program is approved by the State Bar of Texas for a total of 20.25 hours, including 1.25 hours of ethics. Course ID Number: 174069004. 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. Attorneys filing by self-submission in certain states may be required to pay an additional fee. CAIL conferences are typically accredited by all mandatory CLE states.

Specialization Credit: We anticipate approval by the Texas Board of Legal Specialization for 20.25 hours in the following areas: Estate Planning and Probate Law and Tax Law.

CPA CREDIT: CPA's will receive 24.3 hours of CPE credit, no ethics.

3 WAYS TO REGISTER

Payment must accompany registration.

- ONLINE
credit card only
www.cailaw.org
- MAIL
check or credit card
The Center for American and International Law
5201 Democracy Dr.
Plano, Texas 75024
- PHONE
credit card only
972.244.3404
8:30am-5:00pm CT



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AND INTERNATIONAL LAW

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The Center for American and International Law
5201 Democracy Drive
Plano, TX USA 75024

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please pass it along to an interested colleague.

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