

49th Annual Midwest-Midsouth

ESTATE PLANNING INSTITUTE

July 28 & 29, 2022

AT THE HISTORIC KEENELAND RACECOURSE
(Remote attendance option available.)

12.75 Hours of CLE Credit, Including 2 Hours of Ethics



49th Annual Midwest-Midsouth Estate Planning Institute

THURSDAY, JULY 28, 2022

FRIDAY, JULY 29, 2022

Enroll now for this summer's Institute, covering critical issues for estate planning and administration professionals.

The University of Kentucky College of Law Office of Continuing Legal Education takes pride in presenting authoritative, practical programs in estate planning and estate administration. Join the loyal group of participants who register for this mid-summer program every year. Each July, a distinguished regional and national faculty contribute writings and discussions to update you on essential topics, explore new areas and provide fresh, practical analyses for the complexities of modern estate planning practice.

UK/CLE's Annual Estate Planning Institute:
The oldest tradition in estate planning & CLE in the Midsouth.
The longest-running annual CLE event in the Commonwealth.

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 Dinsmore & Shohl LLP
 Lexington, Kentucky

Turney P. Berry
 Wyatt Tarrant & Combs LLP
 Louisville, Kentucky

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2022 Institute Sponsors & Exhibitors

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- Hindman Auctions
- KBA Probate & Trust Law Section
- Krause Financial Services
- Lawyers Mutual of Kentucky
- Lawyers With Purpose
- PNC Wealth Management
- Sotheby's
- Stock Yards Bank Wealth Management & Trust

7:30 a.m. CONTINENTAL BREAKFAST / LATE CHECK-IN
 SPONSORED BY PNC WEALTH MANAGEMENT

8:15 a.m. NOTABLE DEVELOPMENTS IN ESTATE PLANNING & ADMINISTRATION
 Turney P. Berry // Wyatt, Tarrant & Combs LLP, Louisville, Kentucky
 Charles A. ("Clary") Redd // Stinson LLP, St. Louis, Missouri

9:25 a.m. MORNING BREAK

9:45 a.m. LEGAL ETHICS: UNDERSTANDING THE KBA'S DISCIPLINARY PROCESS
 Jane H. Herrick // Kentucky Bar Association, Frankfort, Kentucky

10:45 a.m. CONTEMPORARY TRUST ADMINISTRATION CHALLENGES
 Charles A. ("Clary") Redd // Stinson LLP, St. Louis, Missouri

11:45 a.m. LUNCH BREAK SPONSORED BY ARGENT TRUST COMPANY

12:35 p.m. ANNUAL KENTUCKY LEGISLATIVE & CASE LAW UPDATE IN ESTATE PLANNING/
 PROBATE
 Scott A. Weinberg // Lynch, Cox, Gilman, & Goodman P.S.C., Louisville, Kentucky

1:05 p.m. INCOME TAXATION OF ESTATES AND TRUSTS
 Mickey R. Davis // Davis & Willms, PLLC, Houston, Texas
 Melissa J. Willms // Davis & Willms, PLLC, Houston, Texas

2:05 p.m. AFTERNOON BREAK SPONSORED BY FIFTH THIRD PRIVATE BANK

2:20 p.m. RETIREMENT BENEFITS, ASSET PROTECTION, & POST-MORTEM PLANNING ISSUES
 Robert K. Kirkland // Kirkland Woods & Martinsen LLP, Liberty, Missouri

3:20 p.m. 60 TIPS IN 60 MINUTES
 Timothy G. Barrett // Argent Trust, Louisville, Kentucky
 Edward J. Buechel // Buechel & Conley, PLLC, Edgewood, Kentucky
 Wayne F. Wilson // Dinsmore & Shohl LLP, Louisville, Kentucky
 Stephanie McGehee-Shacklette // Berry & McGehee PLLC, Bowling Green, Kentucky
 Melanie L. McCoy // Frost Brown Todd LLC, Louisville, Kentucky
 Tawana L. Edwards // Attorney at Law, Goshen, Kentucky

4:20 p.m. ADJOURN INSTITUTE

REGISTRATION & CANCELLATION INFORMATION

Pre-registration is strongly recommended. If you cancel, a full refund of tuition (less \$50 administrative charge) is given up to 4:30 p.m. EST, July 22, 2022. Registrants who cancel may still request course materials. If requested, course materials will be emailed after the seminar and the cost will be deducted from any refund. **No refunds are available for cancellations after the deadline;** however, materials will be emailed immediately in full consideration for tuition paid. Registrations are transferable and substitution of registrants may be made any time before the seminar begins.

CONFERENCE LOCATION & ACCOMMODATIONS

The conference itself will be held at the historic Keeneland Racecourse Sales Pavilion in the bluegrass region of Kentucky, located at 4201 Versailles Road in Lexington, Kentucky. Hotel rooms for conference participants have been blocked at Lexington Marriott City Center, located at 121 West Vine Street. The block is from July 27 through July 28, 2022. Rooms will be held until July 6, 2022, **or until sold out**, at the rate of \$199 per night. Reserve rooms directly with the hotel online at <[tinyurl.com/EstatePlanning2022](https://www.tinyurl.com/EstatePlanning2022)>. Registrants will need make arrangements to travel from the hotel to Keeneland and back.

REMOTE ATTENDANCE OPTION

This Institute will offer the option of attending virtually via live-streamed video. Instructions will be provided if you select this option on the registration form. You will need stable, high-speed internet access and a computer, laptop, tablet, or other mobile device.

COVID-19 SAFETY PLAN

If it is deemed unsafe to hold this Institute in person, please note that it will be offered as a live, interactive Zoom webinar on the same dates and following the same agenda times. We will notify registrants of this change as soon as is practicable. See registrant cancellation policy above.

UK/CLE wishes to thank the KBA PROBATE & TRUST LAW SECTION for its annual sponsorship of funds toward out-of-state speaker expenses.

49th Annual Midwest-Midsouth Estate Planning Institute

Thursday, July 28 & Friday, July 29, 2022

I would like to attend the Institute in-person at Keeneland, and:

- I would like the course materials in **hard-copy** format. I enclose conference tuition of **\$445**.
- I would like the course materials in **PDF** format. I enclose conference tuition of **\$379**.

I understand that for safety reasons, the Institute may be moved to the webinar format depending on circumstances surrounding the COVID-19 pandemic.

I would like to attend the Institute remotely via a live video stream with the course materials in **PDF** format.

I enclose conference tuition of **\$379**.

I can not attend the Institute, but would like to purchase the course materials:

- I would like the course materials in **hard-copy** format. I enclose **\$99**. (Ky. residents add 6% sales tax for a total of \$104.94.)
- I would like the course materials in **PDF** format. I enclose **\$79**. (Ky. residents add 6% sales tax for a total of \$83.74.)

THIS FORM CANNOT BE SUBMITTED ONLINE. Please print and mail or call our office to register: 859-257-2921.

TO PAY BY CREDIT CARD: Call us at (859) 257-2921 and we can take your order and credit card information in one step. We can accept Visa, MasterCard, AmEx, or Discover.

TO PAY BY CHECK: Mail this form with your check, made payable to the University of Kentucky, to our office: UK Office of Continuing Legal Education, 660 South Limestone, Lexington 40506-0417. A \$25.00 fee will be charged for all returned checks. USPS First Class Mail may take up to 14 days to arrive.

NAME		
FIRM / AFFILIATION		PHONE
STREET AND MAILING ADDRESS		E-MAIL ADDRESS (required)
CITY	STATE	ZIP CODE