

*50<sup>th</sup> Annual Midwest-Midsouth*

# ESTATE PLANNING INSTITUTE

August 3 & 4, 2023

Embassy Suites by Hilton (Lexington/UK Coldstream)  
Lexington, Kentucky

**13 Hours of CLE Credit, Including 2 Hours of Ethics**



REMOTE ATTENDANCE OPTION AVAILABLE

# 50<sup>th</sup> Annual Midwest-Midsouth Estate Planning Institute

THURSDAY, AUGUST 3, 2023

FRIDAY, AUGUST 4, 2023

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 summer, 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.*

## INSTITUTE CO-CHAIRS

**Glen S. Bagby**  
 Dinsmore & Shohl LLP  
 Lexington, Kentucky

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

## PLANNING COMMITTEE

**Timothy G. Barrett**  
 Argent Trust Company

**Mary J. Healy**  
 Dinsmore & Shohl LLP

**John T. Bondurant**  
 Attorney at Law (1936-2023)

**Mark T. MacDonald**  
 Wyatt Tarrant & Combs LLP

**Douglas A. Bozell**  
 Douglas A. Bozell PLLC

**Melanie L. McCoy**  
 Frost Brown Todd LLC

**Kelli E. Brown**  
 Goldberg Simpson

**Stephanie McGehee-Shacklette**  
 Berry & McGehee PLLC

**Kevin P. Bucknam**  
 UK RCoL Continuing Legal Education

**Suzanne Shaffar**  
 The Glenview Trust Company

**Edward J. Buechel**  
 Buechel & Conley, PLLC

**Andy D. Waters**  
 Community Trust & Investment Company

**Cynthia S. Buttorff**  
 Seiller Waterman LLC

**Scott A. Weinberg**  
 Lynch, Cox, Gilman, & Goodman P.S.C.

**Tawana L. Edwards**  
 Attorney at Law

**Wayne F. Wilson**  
 Dinsmore & Shohl LLP

**Dani Fowles**  
 PNC Wealth Management

**James C. "Jim" Worthington, Sr.**  
 Worthington Law Firm

## 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 28, 2023. 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.

## SEMINAR LOCATION & ACCOMMODATIONS

The conference will be held at the Embassy Suites (Lexington/UK Coldstream), located at 1801 Newtown Pike, just off I-75 in Lexington, Kentucky. The participant room block is for August 2 through August 4, 2023. Rooms will be held until July 1, 2023, **or until sold out**, at the rate of \$145 per night. Reserve rooms directly with the hotel by calling 859-455-5000 and identifying yourself as being with the group *UK Office of Continuing Legal Education*. There is no additional fee to park at the hotel.

## 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.

## 2023 Institute Sponsors & Exhibitors

- American Cancer Society
- Argent Trust Company
- Bessemer Trust
- Bluegrass Community Foundation
- Bonhams
- Central Bank & Trust Company
- Christie's
- Commonwealth Trust Company
- Community Foundation of Louisville
- Community Trust & Investment Company
- Cumberland Trust
- Dean Dorton
- Fifth Third Private Bank
- Hindman Auctions
- KBA Probate and Trust Law Section
- Krause Financial Services
- PNC Wealth Management
- Sotheby's
- Stock Yards Bank Wealth Management & Trust
- The Glenview Trust Company

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

# 50<sup>th</sup> Annual Midwest-Midsouth Estate Planning Institute

Thursday & Friday, August 3 & 4, 2023


I would like to attend the Institute in-person at Embassy Suites (Lexington/UK Coldstream), and:

I would like the course materials in **hard-copy** format. I enclose conference tuition of **\$445**.  
*Only available if registration received before July 24, 2023*

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

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**.

**If you would like to only purchase the course materials (no CLE credit), please contact our office at 859-257-2921.**  
*Hard copy orders must be received before July 24, 2023.*

**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