

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

SO CELEBRATING VEARS OF NG CLE

# 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

7:30 a.m.	REGISTRATION TABLE OPENS / CONTINENTAL BREAKFAST SPONSORED BY CENTRAL BANK & TRUST CO.
8:05 a.m.	WELCOME AND ANNOUNCEMENTS
8:15 a.m.	NOTABLE DEVELOPMENTS IN ESTATE PLANNING & ADMINISTRATION Turney P. Berry, Wyatt, Tarrant & Combs LLP Charles A. Redd, Stinson LLP
9:30 a.m.	KENTUCKY CASE LAW & LEGISLATIVE UPDATE IN ESTATE PLANNING & ADMINISTRATION Scott A. Weinberg, Lynch, Cox, Gilman, & Goodman P.S.C.
9:45 a.m.	MORNING BREAK
10:05 a.m.	CREDITOR RIGHTS ISSUES FOR THE ESTATE Jennifer T. Leonard, Leonard Law, P.S.C.
10:55 a.m.	SPOUSAL LIFETIME ACCESS TRUSTS Charles A. Redd, Stinson LLP

#### 11:45 a.m. LUNCH BREAK SPONSORED BY COMMUNITY TRUST & INVESTMENT COMPANY

- 12:45 p.m. KENTUCKY INHERITANCE TAX REFRESHER & PRACTICE ISSUES James Orr, Ky. Dep't of Revenue Elizabeth Leatherman, J.D., CPA, Dean Dorton Sherry M. Feldpausch, The Glenview Trust Company
- 1:35 p.m. ELECTRONIC ASSETS IN ESTATE PLANNING Scott A. Weinberg, Lynch, Cox, Gilman, & Goodman P.S.C. Eli C. Bronn, Lynch, Cox, Gilman, & Goodman P.S.C. Tash Perrin, Christie's
- 2:30 p.m. AFTERNOON BREAK SPONSORED BY STOCK YARDS BANK & TRUST
- 2:50 p.m. THE SECURE ("SETTING EVERY COMMUNITY UP FOR RETIREMENT ENHANCEMENT" OR "SENDING EVERYONE COWERING UNDER REDUCED EXPECTATIONS") ACT AND OTHER RECENT DEVELOPMENTS IN ESTATE PLANNING FOR RETIREMENT ASSETS Robert K. Kirkland, Kirkland Woods & Martinsen LLP
- 3:40 p.m. LEGAL ETHICS: CYBERSECURITY AND SECURED DOCUMENT TRANSMISSION Jason Miller, Dean Dorton Jim Worthington, Worthington Law Firm
- 4:40 p.m. RECESS INSTITUTE | COCKTAIL RECEPTION IMMEDIATELY FOLLOWING SPONSORED BY DEAN DORTON

#### 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

## FRIDAY, AUGUST 4, 2023

7:45 a.m.	CONTINENTAL BREAKFAST / LATE CHECK-IN SPONSORED BY PNC WEALTH MANAGEMENT
8:30 a.m.	THE PAST YEAR'S MOST SIGNIFICANT, CURIOUS, OR DOWNRIGHT FASCINATING FIDUCIARY CASES Dana G. Fitzsimons Jr., Bessemer Trust
9:30 a.m.	BUSINESS SUCCESSION PLANNING ISSUES FOR THE ESTATE PLANNER Jennifer McEwen, Maynard Nexsen
10:30 a.m.	MORNING BREAK
10:50 a.m.	NO CONTEST CLAUSES: STRIKING TERROR INTO THE HEARTS OF ANYONE SEEKING TO UNDERMINE TESTAMENTARY INTENT? Meghan G. Hubbard, McGuire Woods
11:40 a.m.	LUNCH BREAK SPONSORED BY ARGENT TRUST COMPANY
12:40 p.m.	IF THE ETHICS RULES WERE SIMPLE, WHY IS THERE A HOTLINE? (SHELLY'S 30 YEARS ON THE HOTLINE) Sheldon G. Gilman, Attorney at Law
1:40 p.m.	THE GENEROUS BUSINESS: HOW FAMILIES USE THEIR BUSINESS AS AN ENGINE FOR GENEROSITY Michael L. King, National Christian Foundation
2:35 p.m.	AFTERNOON BREAK SPONSORED BY FIFTH THIRD PRIVATE BANK
2:50 p.m.	TRUST ADMINISTRATION & THE DRAFTER'S INTENT Timothy G. Barrett, Argent Trust Company Stephanie McGehee-Shacklette, Berry & McGehee PLLC
3:45 p.m.	FORESEEABLE PLANNING FOR THE UNFORESEEABLE FUTURE – PLANNING PROVISIONS AND TECHNIQUES TO ASSIST WITH SPECIAL NEEDS PLANNING AND OTHER BENEFICIARY ISSUES Mary Elizabeth Anderson, Wyatt Tarrant & Combs LLP Seth Todd, Wyatt Tarrant & Combs LLP

4:30 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 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.

## 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 Mary J. Healy Argent Trust Company

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

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Suzanne Shaffar The Glenview Trust Company

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

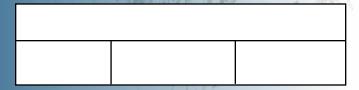
Scott A. Weinberg Lynch, Cox, Gilman, & Goodman P.S.C.

Wayne F. Wilson Dinsmore & Shohl LLP

James C. "Jim" Worthington, Sr.

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	