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Law
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Education

47th Annual Midwest-Midsouth

ESTATE PLANNING INSTITUTE

July 30 & 31, 2020

A Live Webinar Presented Via ZOOM

13 Hours of CLE Credit, Including 2 Hours of Ethics

47th Annual Midwest-Midsouth Estate Planning Institute

THURSDAY, JULY 30, 2020

- 8:00 a.m. **JOIN ZOOM MEETING**
Click the link sent via email, follow the on-screen instructions from Zoom, and adjust your audio/video settings.
- 8:10 a.m. **WELCOME AND ANNOUNCEMENTS**
- 8:20 a.m. **THINGS ABOUT WHICH WE SHOULD BE FIRED UP, WORRIED, SURPRISED, OR SHOCKED**
Turney P. Berry, *Wyatt, Tarrant & Combs LLP*
Charles A. ("Clary") Redd, *Stinson LLP*
- 9:50 a.m. **MORNING BREAK**
- 10:10 a.m. **ESTATE PLANNING AND TRUST MANAGEMENT FOR A BRAVE NEW WORLD: IT'S ALL IN THE FAMILY... WHAT'S A FAMILY?**
R. Hugh McGill, *The Northern Trust Company*
- 11:10 a.m. **IDENTIFYING LANDMINES AND MINIMIZING BATTLE SCARS IN TRUST ADMINISTRATION**
Charles A. ("Clary") Redd, *Stinson LLP*
- 12:00 p.m. **LUNCH BREAK**
- 12:50 p.m. **TRUST AND TAX PLANNING FOR IRAS IN LIGHT OF SECURE ACT**
Edwin P. Morrow III, *U.S. Bank Private Wealth Management*
- 1:50 p.m. **CORRECTING MISCONCEPTIONS, DISPELLING MYTHS AND SETTING THE RECORD STRAIGHT ABOUT ELDER LAW AND THE LONG-TERM CARE WORLD**
Misty Clark Vantrease, *Kentucky ElderLaw, PLLC*
- 2:40 p.m. **AFTERNOON BREAK**
- 3:00 p.m. **LIFE CYCLE OF A FAMILY FOUNDATION & OTHER CHARITABLE PLANNING ISSUES**
Melissa Spievack, *Dinsmore & Shohl LLP*
- 3:50 p.m. **THE KBA PROBATE & TRUST LAW SECTION ANNUAL CASE LAW & LEGISLATIVE UPDATE AND PRACTITIONERS' ROUNDTABLE**
Kathryn S. Beck, *Stoll Keenon Ogden PLLC*
James C. ("Jim") Worthington, Sr., *Worthington Law Firm*
Edward J. Buechel, *Buechel & Conley, PLLC*
Tawana Edwards, *The Glenview Trust Company*
- 4:40 p.m. **RECESS INSTITUTE**

FRIDAY JULY 31, 2020

- 7:50 a.m. **JOIN ZOOM MEETING**
- 8:00 a.m. **UNIFORM TRUST CODE AND FIDUCIARY LITIGATION UPDATE**
Katherine P. Langan, *Dinsmore & Shohl LLP*
- 9:10 a.m. **WE LOVE YOU BUT WE DON'T TRUST YOU: PREVENTING YOUR CHILD'S SPOUSE FROM BECOMING A TRUST BENEFICIARY IF THEY DIVORCE**
Bruce M. Stone, *Goldman Felcoski & Stone, P.A.*
- 10:10 a.m. **MORNING BREAK**
- 10:30 a.m. **ETHICAL CHALLENGES WHEN DEALING WITH ELDER FINANCIAL ABUSE**
Mary F. Radford, *Marjorie Fine Knowles Professor of Law, Georgia State University College of Law*
- 11:30 a.m. **LUNCH BREAK**
- 12:30 p.m. **LIFE POST-KAESTNER: CONSTITUTIONAL CONSIDERATIONS IN THE STATE TAXATION OF TRUSTS**
Toni Ann Kruse, *McDermott Will & Emery LLP*
- 1:30 p.m. **AFTERNOON BREAK**
- 1:50 p.m. **PROTECTING CLIENT DATA: ETHICS, SECURITY, AND PRACTICALITY FOR ESTATE PLANNERS**
James D. Lamm, *Lathrop GPM*
- 2:50 p.m. **TEN TOOLS EVERY ESTATE PLANNER SHOULD KNOW HOW TO USE**
Mickey R. Davis, *Davis & Willms, PLLC*
Melissa J. Willms, *Davis & Willms, PLLC*
- 4:00 p.m. **ADJOURN INSTITUTE**

NOW A LIVE WEBINAR BROADCAST VIA ZOOM

Due to circumstances surrounding the COVID-19 outbreak, this year's program will be presented as a webinar via Zoom. You do NOT need a Zoom account to participate, and accessing the Zoom session on the day is as easy as clicking a link in your email a few minutes before webinar's start time. You will need stable, high-speed internet access to participate in this event and a computer, laptop, tablet, or other mobile device. Presentations are given live, but recorded so that you may go back and watch anything that might have been missed.

Not sure if you want to try Zoom? Here are two short videos that show how easy it is:

Beginner's Intro: <https://youtu.be/9isp3qPeQ0E> (3 minutes, 30 seconds)

Quick Start: <https://youtu.be/hlkCmbvAHQQ> (1 minute)

REGISTRATION INFORMATION

This webinar is offered at a special discounted price of only \$299 and comes with a PDF version of the course materials. Printed materials will not be available. Pre-registration is strongly recommended. A few days before the Institute, you will receive an email with a link to download the PDF course materials and another link to use on July 30 & 31 to join the webinar, so please save emails from UK/CLE carefully. This program is accredited by the Kentucky Bar Association for 13 hours of CLE credit, including 2 hours of Ethics credit.

CANCELLATIONS & SUBSTITUTIONS

Upon cancellation, a full refund of tuition (less \$50 administrative/course materials charge) is given up to 4:30 p.m. EST, July 23, 2020. No refunds are available for cancellations after the deadline; however, PDF materials are yours to keep in full consideration for tuition paid. Registrations are transferable and substitution of registrants may be made any time before the seminar begins.

ADDITIONAL INFORMATION

Write or call the Office of Continuing Legal Education at: 660 S. Limestone, Lexington, KY 40506-0417, (859) 257-2921, or visit our NEW website at: LAW.UKY.EDU/CLE.

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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 & The longest-running annual CLE event in CLE in the Midsouth. the Commonwealth.

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UK/CLE wishes to thank the KBA - PROBATE & TRUST LAW SECTION for its annual sponsorship of funds toward this institute.

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WEBINAR REGISTRATION FORM

Thursday, July 30 & Friday, July 31, 2020

Name

Firm / Affiliation

Address

City

State

Zip Code

Phone

Fax

Email *(required)*

- Please register me for the Annual Midwest-Midsouth Estate Planning Institute **webinar presented via Zoom** on July 30 & 31, 2020, with **PDF course materials.** **\$299 enclosed**
- I cannot attend, but would like to order the **PDF course materials.** **\$79 enclosed**
Kentucky residents add 6% sales tax for a total of \$83.74.

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