



Thursday-Friday, May 5-6, 2011
Overland Park Convention Center
6000 College Blvd., Overland Park, Kansas
WWW.KCEPS.ORG

In cooperation with the Estate Planning Societies of Kansas City and Eastern Kansas, the Financial Planning Association of Greater Kansas City, UMKC Henry W. Bloch School of Management and UMKC School of Law

Continuing Education Credit available for Attorneys, Certified Financial Planners (CFPs), Certified Public Accountants (CPAs) and Insurance Professionals. Details at WWW.KCEPS.ORG

Thursday, May 5, 2011

- 7:30 am** Registration and Continental breakfast
- 8:45 am** **RECENT DEVELOPMENTS AFFECTING ESTATE PLANNING**
Charles D. “Skip” Fox IV, *McGuireWoods LLP*, Charlottesville, Virginia
- 9:35 am** **GRANTOR TRUSTS**
Stephen R. Akers, *Bessemer Trust Company*, Dallas, Texas
- 10:45 am** **DEFINED VALUE CLAUSES**
Prof. Christopher Hoyt, *UMKC School of Law*, Kansas City, Missouri
- 12:05 pm** Luncheon sponsored by *The Private Client Reserve at US Bank*
- 1:00 pm** **ETHICAL BREACHES OF FIDUCIARY DUTY (1 hour ethics)**
Charles A. “Clary” Redd, *SNR Denton*, St. Louis, Missouri
- 1:50 pm** **FLPS/AUDITING PROOF**
Stephanie Loomis-Price, *Baker Botts, LLP*, Houston, Texas
- 3:00 pm** **ADDING PROTECTIVE MEASURES TO COMMONLY UTILIZED ESTATE PLANNING VEHICLES**
Elizabeth M. Schurig, *Schurig Jetel Beckett Tackett*, Austin, Texas
- 3:50 pm** **BEST ESTATE PLANNING IDEAS**
S. Stacy Eastland, *Goldman, Sachs & Co.* Houston, Texas
- 4:40 pm** Cocktail Reception sponsored by *Midwest Trust*

Friday, May 6, 2011

- 7:30 am** **ETHICAL PITFALLS AND HOW TO AVOID BECOMING A PARTY (1 hour ethics)**
Eric A. Manterfield, *Krieg DeVault LLP*, Noblesville, Indiana
- 8:40 am** **INSURANCE TOPIC**
Charles L. Ratner, *Ernst & Young LLP*, Cleveland, Ohio
- 9:30 am** **ESTATE PLANNING FOR RETIREMENT: PRACTICE POINTERS WITH CAVEATS**
Marcia Chadwick Holt, *Davis Graham & Stubbs LLP*, Denver, Colorado

- 10:40 am** **HITCHHIKER’S GUIDE TO INTERNATIONAL ESTATE PLANNING**
Prof. Samuel A. Donaldson, *University of Washington School of Law*, Seattle, Washington
- 12:00 pm** Luncheon presentation
Dean Teng-Kee Tan, *UMKC Henry W. Bloch School of Management*, Kansas City, Missouri
- 12:55 pm.** Breakout A- **FAMILY BUSINESS ENTREPRENEURSHIP-WHAT IN THE WORLD IS A FAMILY BUSINESS?**
George S. Vozikis, Ph. D., *Craig School of Business California State University*, Fresno, California
Bob Brockhaus, *Brockhaus Group*, St. Louis, Missouri
- Breakout B- **ROTH IRA’S: CONVERSIONS, RECHARACTERIZATIONS, RECONVERSIONS AND OTHER SELECTED TOPICS**
Marcia Chadwick Holt, *Davis Graham & Stubbs LLP*, Denver, Colorado
- 1:55 pm** Breakout C- **FAMILY BUSINESS ENTREPRENEURSHIP-WHAT IN THE WORLD IS A FAMILY BUSINESS? continued**
George S. Vozikis, Ph. D., *Craig School of Business California State University*, Fresno, California
Bob Brockhaus, *Brockhaus Group*, St. Louis, Missouri
- Breakout D- **LIFETIME AND TESTAMENTARY CHARITABLE USES OF RETIREMENT ASSETS**
Prof. Christopher Hoyt, *UMKC School of Law*, Kansas City, Missouri
- 2:55 pm** Breakout E- **PARTNERSHIP TAX FOR ESTATE PLANNERS**
Prof. Samuel A. Donaldson, *University of Washington School of Law*, Seattle, Washington
- Breakout F- **TRUST MODIFICATION/TERMINATION**
Charles A. “Clary” Redd, *SNR Denton*, St. Louis, Missouri
- 4 pm** **SUMMARY OF PRACTICAL LESSONS LEARNED DURING SYMPOSIUM**
Eric A. Manterfield, *Krieg DeVault LLP*, Noblesville, Indiana

REGISTRATION FEE: \$295 for Symposium

Please register for breakout sessions:

- A-Family Business C-Family Business E-Partnership Tax
 B-Roth IRA’s D-Charitable F-Trust Modification

Fill in the following and send with check payable to the Kansas City Estate Planning Symposium to: Continuing Legal Education, UMKC School of Law, 5100 Rockhill Road, Kansas City, Mo. 64110-2499 or fax to (816) 235-5414.

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Cancellations and refund policy: Cancellations received by April 15, 2011 will be refunded. Due to advance commitment requirements, cancellations received after 5 p.m. April 15, 2011 will receive the course materials.

Questions? Please call UMKC Law School Continuing Legal Education (816) 235-1648 or www.kceps.org