

## **The 24th Annual Estate and Charitable Gift Planning Institute**

**September 21, 2016**

### **THE ANNUAL ESTATE PLANNING CHECKUP: Is your client's estate plan healthy enough to pass its annual exam?**

#### **AGENDA**

##### **Session I**

**Samuel A. Donaldson – Recent Developments in the Federal Tax Laws**

**9:30 - 11:00 a.m.**

The annual check-up begins with a complete overview of recent developments in federal income, estate and gift tax laws. This thorough and entertaining review of current statutes, regulations, rulings, and case law of interest to estate and charitable planners will include:

- Charitable planning techniques recently made permanent
- Dealing with the new basis consistency requirements and reporting rules
- Update on the use of conservation easements and façade easements
- New developments in the use of *Crummey* powers

##### **Ethics Session**

**Ann Burns – The Annual Check-Up**

**11:00 - Noon**

The annual check-up is the perfect time to review whether new conflicts have arisen and to refresh client communications on ethical issues. This ethics session will include a review of current rulings and cases around the country on ethics topics including:

- Technology's impact on attorney's ethical obligations
- Heightening staff's awareness of loss prevention issues

- Joint representation of spouses and family members in estate planning
- Conflicts that arise during the course of representation

**LUNCH (on your own)**  
**12:00 noon to 1:00 p.m.**

**Session II**  
**Ann Burns and Samuel A. Donaldson – Conducting the Annual Estate Planning Check-up**  
**1:00 - 3:00 p.m.**

The adage that prevention is the best cure applies to your clients' estate plans as well as our health. Nothing substitutes for an annual review to catch mistakes, assess changes in the law, become aware of changes in clients' circumstances, and anticipate future concerns. Ann and Sam will walk through the elements of an annual review of a client's estate plan, including:

- Assessing a plan's health
- Determining the impact of law changes
- Checking for conflicts and other ethics issues
- Using checklists to weigh a plan's fitness

**Session III**  
**Ann Burns and Sam Donaldson – Wrap-up Discussion/Q&A**  
**3:00 - 3:30 p.m.**

**Conclusion**  
**3:30 p.m.**

