TennBarU
CLE FOR TENNESSEE

Estate Planning Forum 2012
February 24, 2012 – Nashville, TN

Program Description: Join the TBA's Estate Planning Section at its annual Estate Planning Forum, where you will be able to learn from Tennessee's top attorneys on estate planning techniques and probate considerations, as well as gain insight into the new legislation and case law rulings affecting these areas. This information-packed, full-day program will provide 6 CLE hours, including 1 hour of ethics credit. ***Breakfast & Lunch will also be provided***.

Program Producer: Victoria Tillman, *Anne M. McKinney, P.C.*

Agenda

8:00 – 8:30 a.m.	**Registration/Breakfast** (***Breakfast Sponsored by: Independence Trust***)
8:30 – 9:30 a.m. **[Tab 1]**	**Clayton Trusts** *When we have very little certainty about the future shape and magnitude of the federal estate tax and Tennessee inheritance tax, Clayton QTIP trusts offer a flexible alternative to formula and disclaimer planning. This session will address the advantages and disadvantages of Clayton planning and provide language for creating and implementing this flexible option.* **Michael Parham**, *Parham Estate Planning* **Eddy R. Smith**, *Holbrook Peterson Smith PLLC*
9:30- 10:30 a.m. **[Tab 2]**	**Planning for Nontraditional Couples** *Estate planning for the nontraditional couple addresses the issues facing practitioners in this challenging and dynamic environment. It will cover the evolving areas of same-sex marriages, domestic partnerships and civil unions in and from other states and how these non-Tennessee legal relationships may effect Tennessee estate planners. Moreover, it will address estate planning for the Tennessee same-sex couple.* **David Parsons**, *Baker Campbell & Parsons*
10:30 – 10:45 a.m.	**BREAK**

10:45 – 11:45 a.m. **[Tab 3]**	**Charitable Trusts** *This course will help participants with an understanding of the benefits to and motivations behind charitable giving, teach tools to assist attorneys in identifying clients that are charitably inclined, help to understand specific ways in which they can plan for charitable transfers, and recommend strategies that are highly effective in the current economic and tax environment.* **Reese Veltenaar**, *Acumen Wealth Advisors* **Joanie Sompayrac,** *University of Tennessee at Chattanooga*
11:45 – 1:00 p.m.	LUNCH (***lunch will be provided***) (***Sponsored by: First Tennessee Bank)***
1:00 – 2:00 p.m. **[Tab 4]**	**Fiduciary Duties** *This segment of the program will explore the fiduciary duties of attorneys-in-fact, trustees, and personal representatives. Checklists for each fiduciary are included in the presentation, along with common law principles, Tennessee statutes and case law.* **Victoria Tillman**, *Anne M. McKinney, P.C* **Anne M. McKinney**, *Anne M. McKinney, P.C.*
2:00 – 3:00 p.m. **[Tab 5]**	**Becoming and Staying Well: Tips for Increasing Your Well-Being** **(1 Dual)** *What does it mean to be well . . . to be happy . . . to thrive? This session is devoted to attorney well-being -- what it is, why it is important, how to get, and how to maintain it. We'll start the session with a discussion of recent scientific research related to attorney well-being and professional engagement. Then we'll talk about specific skills or tactics that lawyers can use in the "real world" to feel better and to increase their resilience, commitment, energy, and engagement with their legal practices.* **Andrew C. Branham**, *Counsel on Call Inc.* **Candice Reed,** *Candice Reed Consulting*
3:00 – 3:15 p.m.	**BREAK** (***Sponsored by: Wealth Counsel)***

3:15 – 4:15 p.m.
[Tab 6]

Legislative Update
A summary of legislation adopted by and being considered by the Tennessee Legislature; legislation adopted by Congress and decisions made by various Courts and agencies affecting estate planning, estate administration and tax matters. Be up to date on matters affecting your practice and your clients.
Albert Secor, *CapitalMark Bank & Trust*

Credit hours: 5 general, 1 dual