

Estate Planning & Probate Forum

February 23, 2018

Embassy Suites Hotel – Franklin, Tenn.



Program Producer: Jennifer Kent Exum, Chambliss, Bahner & Stophel PC

Total Credits: 5 General, 1 Dual

Join estate planning and probate practitioners from across the state at TBA's annual forum. Speakers will address family law issues, IRA planning and best practices, Medicare benefits and our legislative update with Albert Secor of Southeastern Trust Company. The popular probate panel returns with Chancellor Jeffrey Atherton, Judge Kathleen Gomes and attorneys Matthew Thorton and Jennifer Exum to offer guidance and answer questions. You will have the opportunity to visit with colleagues, learn from sponsors and share ideas during lunch.

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| 8 a.m. – 8:30 a.m. |  Registration/Welcome/Breakfast
Sponsored by American Cancer Society |
| 8:30 a.m. – 9:30 a.m. | Dealing With Existing And New Trusts In Divorce Actions, And Related Family Law Concerns In Estate Planning
David Parsons, David Parsons Law |
| 9:30 a.m. – 10:30 a.m. | IRA Planning
Joel Roettger, Gentry, Tipton & McLemore
Stacy Roettger, The Trust Company Of Knoxville |
| 10:30 a.m. – 10:45 a.m. |  Break
Sponsored by Argent Trust |
| 10:45 a.m. – 11:45 a.m. | Why Things Happen with Medicare and Coordination of Benefits
Frank Cardenas, President of FEDlogic, LLC |
| 11:45 a.m. – 12:45 p.m. |  Lunch (Included)
Sponsored by Patton Albertson & Miller |
| 12:45 p.m. – 1:45 p.m.
(DUAL) | Ethics Bowl
Newman Bankston, Egerton, McAfee, Armistead & Davis
Jeffrey Carson, Diversified Trust
Sandra Garrett, The Board of Professional Responsibility
Donald Farinato, Hodges, Doughty & Carson, PLLC
Joel Roettger, Gentry, Tipton & McLemore |

1:45 p.m. – 2:45 p.m.

Probate Panel

Chancellor Jeffrey Atherton, Chancery Court of Hamilton County
Newman Bankston, Egerton, McAfee, Armistead & Davis
Judge Kathleen Gomes, Probate Court of Shelby County-Division One
Jennifer Kent Exum, Chambliss, Bahner & Stophel
Matthew Thornton, Bourland Heflin Alvarez Minor & Matthews

2:45 p.m. – 3:00 p.m.



Break

Sponsored by Franklin Synergy Bank

3:00 p.m. – 4:00 p.m.

Legislative Update

Albert Secor, Southeastern Trust Company