

# TBA Estate Planning & Probate Forum

Feb. 18, 2022 – Embassy Suites Cool Springs

**Program Producer:** Mike Parham, Parham Estate Law

**Total Credits:** 6 General, 1 Dual



The 2022 Estate Planning & Probate Forum features the insight you need to stay on top of key developments in the practice area. This event provides six hours of CLE, including an hour of dual credit, and will be focused on timely, relevant topics such as: legislative updates, ethics, a clerk & masters' panel, recent developments to Tennessee as a trust jurisdiction to specific estate planning and charitable giving topics, and much more.

8 – 8:30 a.m. CST     **Registration/Welcome**

8:30 – 9:30 a.m.     **Tennessee Trust Preeminence**  
Aaron Flinn, Waller Lansden Dortch & Davis  
Eddy Smith, Kennerly, Montgomery & Finley

9:30 – 10:30 a.m.     **Ethics**  
DUAL     This presentation will include conflicts of interest, competence, testamentary capacity, diligence and continuing obligations for planners. The discussion will also feature updates from the Board of Professional Responsibility.  
Laura Chastain, Tennessee Board of Professional Responsibility

10:30 – 10:45 a.m.     **Break**

10:45 – 11:45 a.m.     **Panel Discussion Regarding Administration of Trusts**  
Jeff Carson, Diversified Trust (Moderator)  
Gina King, FirstBank  
Rob Malin, First Horizon Bank  
Stacy Roettger, The Trust Company of Tennessee

11:45 a.m. – 12:45 p.m.     **Lunch (provided)**

- 12:45 - 1:45 p.m.     **Clerk & Master's Panel**  
This annual favorite will feature a panel of Clerk & Masters discussing best practices, and answering live questions posed by attendees.  
Jennifer Kent Exum, Chambliss Bahner & Stophel  
Bill Morrison, Probate Court Clerk Shelby Co.  
Elaine Beeler, Clerk & Master Williamson Co.  
Robin Miller, Clerk & Master Hamilton Co.
- 1:45 - 2:45 p.m.     **Mandatory Conservatorship Training Legislation**  
This session will address the current state of conservatorships in Tennessee. Additionally, the presenters will outline proposed legislation for mandatory training for conservators, tools for conservatorship oversight and a proposal for a statewide office for conservatorship management.  
Amy Bryant, Metro Nashville Office of Conservatorship Management  
Michelle Poss, Attorney at Law
- 2:45 - 3 p.m.         **Break**
- 3 - 4 p.m.            **Succession Planning for the Family Business: Key Considerations**  
Jack Eakin, LCG Advisors
- 4 - 5 p.m.            **Legislative Actions and Interest Items**  
This presentation will report on 2021 legislative actions of the Tennessee Legislature and the US Congress and proposed 2022 Tennessee Legislative action and cases and other interest items affecting estate planning, estate administration, trusts and conservatorships.  
Albert Secor, The Law Firm of Thomas & Thomas