

TBA Estate Planning & Probate Forum

March 6, 2026 – Franklin Marriott Cool Springs

Total Credits: 6 General, 1 Dual

Producer: Rob Malin, Pinnacle Financial Partners



This event provides seven hours of CLE focused on timely, relevant topics such as: estate litigation, legislative updates, ethics, the annual clerk & master's panel, marital deductions, probate concerns and much more. Breakfast and lunch are provided.

8 – 8:30 a.m. CST

Registration

8:30 – 9:30 a.m.

Hot Topics in Probate Court Litigation

Experienced probate litigators will discuss current hot topics in will and trust litigation and key procedural nuances every probate lawyer should know. Topics include fiduciary fees, whether to file a petition or motion, giving notice to interested persons, use of summonses, appeals from probate rulings from judges and magistrates, when to involve the Attorney General in your case and much more.

Andrea Sinclair, Sherrard Roe Voigt & Harbison

Lisa Helton, Sherrard Roe Voigt & Harbison

Rebecca Blair, The Blair Law Firm

9:30 – 10:30 a.m.

AI in Estate Planning

Zack Glaser, The Lawyerist

10:30 – 10:45 a.m.

Break

10:45 – 11:45 a.m.

The One Big Beautiful Bill

Ashley Stearns, Trail Coleman & Stearns

David Parsons, David Parsons Law

11:45 a.m. – 12:45 p.m.

Lunch

12:45 – 1:45 p.m.

Public Receivership

Jennifer Exum, Baker Donelson Bearman Caldwell & Berkowitz
Robin Miller, Hamilton Co. Clerk & Master

1:45 – 2:45 p.m.

DUAL

Conflicts of Interest in Estate Planning and Probate Practice

This session will cover applicable rules of Professional Responsibility that drive the obligations attorneys have to detect, mediate and resolve conflicts of interest in an estate planning and probate setting. The presenter will highlight the particular pitfalls involved with conflicts of interest and estate planning and probate practice, and how these can be avoided, as demonstrated through a mix of court opinions and disciplinary actions.

Arthur Cook, Bass Berry & Sims

2:45 – 3 p.m.

Break

3 – 4 p.m.

Probate Panel

This annual favorite will feature a panel of clerk & masters and probate judges discussing best practices, and answering questions posed by attendees.

Donald Farinato, Hodges Doughty & Carson (Moderator)

Jared Smith, Sequatchie Co. Clerk & Master

Chancellor William Cole, 25th District Chancery Ct.

Judge Toby Gilley, Rutherford Co. General Sessions Court

4 – 5 p.m.

Legislative Actions & Interest Items

This presentation will report on 2025 legislative actions of the Tennessee Legislature and the US Congress and proposed 2026 Tennessee Legislative action and cases and other interest items affecting estate planning, estate administration, trusts and conservatorships.

Albert Secor, Thomas & Thomas