

TBA Estate Planning & Probate Forum

Feb. 28, 2025 – Embassy Suites Cool Springs



Total Credits: 5 General, 2 Dual

Producer: Charles Frazier, Law Offices Of Charles R. Frazier

This event provides seven hours of CLE, including two hours of dual credit, focused on timely, relevant topics such as: community property trusts, AI developments, a probate panel, ethics, legislative updates and much more. Breakfast and lunch are provided.

8 – 8:30 a.m. CST

Registration

8:30 – 9:30 a.m.

Reality: Uncertainty – Navigating your Planning Strategy

The reality is that everything is uncertain, especially with estate planning in today's environment. Death and taxes may be certain, but there are tools you can use to navigate constant change. This presentation provides actionable ideas including disclaimers; filing an estate tax return to protect unused federal tax exemptions; the creative use of non-judicial settlement agreements for estates and trusts; and the use of QTIP elections and other guidance.

Elizabeth Hickman, Pendleton Square Trust

Aaron Flinn, Holland & Knight

9:30 – 10:30 a.m.

DUAL

What Could Possibly Go Wrong? A Lawyer's Guide to Serving as Trustee

Estate Planning attorneys are tasked every day with advising their clients on fiduciary selection and the ethical responsibility of trustees according to Tennessee rules. If the client asks you to serve, should you? What could go wrong?

Branch Howard, Brown Brothers Harriman

Rob Malin, Pinnacle Financial Partners

10:30 – 10:45 a.m.

Break

10:45 – 11:45 a.m.

Community Property Trusts

This session will detail best practices, and pros and cons related to community property trusts.

David Parsons, David Parsons Law

11:45 a.m. – 12:45 p.m.

Lunch

12:45 – 1:45 p.m.

AI Considerations for Estate Planners

This session will explore the rapid evolution of AI in the legal profession, with a special focus on its practical applications in law. This session will showcase real-world use cases, discuss emerging challenges, and engage in a dynamic conversation about the future of AI in legal practice.

Caitlin Moon, Vanderbilt Univ. Law School

Kyle Turner, Vanderbilt Univ. Law School

Mark Williams, Vanderbilt Univ. Law School

1:45 – 2:45 p.m.

DUAL

Ethics

This session will cover ethical implications of generative AI (GAI) including Tennessee formal ethics opinions, ABA Formal Opinion 510, local court rules and more.

Tiffany Tant-Shafer, Tenn. Board of Professional Responsibility

2:45 – 3 p.m.

Break

3 – 4 p.m.

Probate Panel

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

Jennifer Exum, Baker Donelson Bearman Caldwell & Berkowitz (Moderator)

Judge Andra Hedrick, Seventh Circuit Court

Chancellor Jeffrey Atherton, Hamilton Co. Chancery Court

Judge Kathy Gomes, Shelby Co. Probate Court

4 – 5 p.m.

Legislative Actions & Interest Items

This presentation will report on 2024 legislative actions of the Tennessee Legislature and the US Congress and proposed 2025 Tennessee Legislative action and cases and other interest items affecting estate planning, estate administration, trusts and conservatorships.

Albert Secor, Thomas & Thomas