

# 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.

**Notable/Relevant Advancements in Estate Planning**

Elizabeth Hickman, Pendleton Square Trust

John Bunge, 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. 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**

David Parsons, David Parsons Law

11:45 a.m. – 12:45 p.m.

**Lunch** (provided)

12:45 – 1:45 p.m.

**AI considerations**

Caitlin 'Cat' 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**

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