Estate Planning & Probate Forum

February 22, 2019
Embassy Suites Hotel – Franklin, Tenn.

TENNESSEE BAR ASSOCIATION

Program Producer: Michael Goode, Lewis Thomason
Total Credits: 5 General, 1 Dual

This event provides six hours of CLE, including an hour of dual credit and will be focused on timely, relevant topics to help you stay on top of trends affecting this area of law. Legislative updates and the ever-popular Clerk and Masters Panel will ensure that you leave with the knowledge necessary to advance your practice. Do not miss this opportunity to fulfill CLE requirements while networking with attorneys who share your focus and cultivating relationships with fellow practitioners. Section members receive a discounted rate for the program.

8 – 8:30 a.m. **Registration /Breakfast (provided)**

8:30 – 9:30 a.m. **Income Tax Planning for Estates**
With the dramatically increased estate tax exemption, less and less planning revolves around the estate tax since it now affects so few people. As such, income tax planning for estates is now the most important planning for the majority of estate planning clients and we will cover some of the most common issues and solutions.
Michael Goode, Lewis Thomason
David Parsons, Attorney at Law

9:30 – 10:30 a.m. **Medicaid Protection With Trusts**
Integrating estate planning with long-term care planning for trusts that are not just for the rich. Different types of trusts that can be used for reducing income tax concerns. This session will focus on tips and strategies regarding the various options for your clients.
James Barry Jr., J. Barry Law Office

10:30 – 10:45 a.m. **Break**

10:45 – 11:45 a.m. **Clerk and Master's Panel**
Aspects of probate can vary across the state, which is why the Clerk and Master of your local Chancery Court is such an important figure to your practice. This panel allows you to learn from Clerk and Masters and private probate practitioners, while providing answers to your personal probate procedural questions.
Newman Bankston, Egerton, McAfee, Armistead & Davis (Moderator)
Brian Shelton, Carter Shelton Law
Elaine Beeler, Williamson County Chancery Court
Jennifer Kent Exum, Chambliss, Bahner & Stophel, P.C.
Robin Miller, Hamilton County Chancery Court

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

12:45 – 1:45 p.m. **Charitable Planning After the 2017 Tax Act**

The Tax Cuts and Jobs Act of 2017 made major changes to the country's tax laws. While the legislation will potentially simplify the filing process for millions of Americans, it may also complicate giving strategies for many who have historically deducted charitable contributions. This session will provide an in-depth look at topics affecting these contributions such as charitable IRA rollovers, legacy IRAs, lifetime CRATs, charitable gifts from trusts and estates, the private foundation investment tax and donor-advised funds in context of the new legislation to help advisors align donor's philanthropic desires with new giving strategies and opportunities.

Jeff Carson, Diversified Trust
Joe Chickey, Sharpe Group

1:45 – 2:45 p.m. **Checklist for Ethical Practice**

This session will outline a proactive self-assessment to reduce complaints. The checklist discusses core principles such as competence, diligence, communication, conflicts, confidentiality, fees and trust accounts with references to ethics opinions and recent disciplinary decisions.

Sandy Garrett, Tennessee Board of Professional Responsibility

2:45 – 3:00 p.m. **Break**

3 – 4 p.m. **Legislative Updates**

This session will feature updates on legislation enacted within the last year, proposed legislation for the current legislative session and highlights of cases decided that affect the wills, trust, guardian, conservator, probate and trust administration areas.

Albert Secor, Southeastern Trust Company