

Topgolf: Estate Planning Tee-off

Nov. 7, 2024 – Topgolf Nashville



Total Credits: 3 General

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

This program will feature 3 hours of CLE programming, focused on information relevant to new attorneys interested in estate planning and lawyers desiring to add this practice. The package includes breakfast, lunch, plus two hours of Topgolf after the presentations.

8:30 – 9 a.m. CDT

Registration / Breakfast

9 – 10 a.m.

Trust Mulligans: Second Swings at Irrevocable Trusts

Not all irrevocable trusts are found on the fairway. This seminar slices into how to give irrevocable trusts a “second swing,” covering key legal techniques for getting your trust out of the rough. Panelists will explore nonjudicial settlement agreements, modifications, and decanting, along with the benefits and pitfalls for each.

Newman Bankston, Egerton McAfee Armistead & Davis

Rob Malin, Pinnacle Financial Partners

10 – 10:15 a.m.

Break

10:15 – 11:15 a.m.

Estate, Gift & Fiduciary Income Tax Planning and Implementation Issues

This session will provide an overview on selected wealth transfer tax and income tax. Panelists will discuss issues currently faced by the estate planning attorney, the personal representative of an estate and the trustee of a non-grantor trust and the attorney representing those fiduciaries in the administration of estates and trusts.

Charles Frazier, Law Offices of Charles R. Frazier

David Parsons, David Parsons Law

11:15 – 11:30 a.m.

Break

11:30 a.m. – 12:30 p.m.

The Corporate Transparency Act: Implications and Compliance for Legal Practitioners

The Corporate Transparency Act ("CTA"), which went into effect on January 1, 2024, mandates that many U.S. businesses report detailed information about their beneficial owners to the Financial Crimes Enforcement Network of the U.S. Department of Treasury. The primary goal of the CTA is to combat illicit activities such as money laundering, tax fraud, and financing of terrorism by increasing transparency in corporate ownership. This presentation will cover the key provisions of the CTA and its impact on compliance requirements for businesses.

Michael Goode, Lewis Thomason

12:30 – 2:30 p.m.

Lunch / Topgolf Bays Open