# Topgolf: Estate Planning Tee-off

Sept. 12, 2025 – Topgolf Nashville

**Total Credits:** 3 General
**Producer:** Rob Malin, Pinnacle Financial Partners

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. | **Birdies, Bogies and Beneficiaries: Fundamentals of Income Taxation of Trusts and Estates**<br>Work on your tax-swing with a high level primer on income taxes and related issues in administering trusts and estates.<br>Branch Howard, Brown Brothers Harriman<br>Rob Malin, Pinnacle Financial Partners |
| 10 – 10:15 a.m. | **Break** |
| 10:15 – 11:15 a.m. | **Fog on the Course: When the Trustee Can't See the Fairway**<br>This session will provide drafting tips for attorneys from trustees, including best practices, real-life examples and helpful considerations.<br>Chris Kelly, Argent Trust |
| 11:15 – 11:30 a.m. | **Break** |
| 11:30 a.m. – 12:30 p.m. | **When to Call the ~~Club~~ Special Needs Pro**<br>This session will provide the basics of public benefits and information about spotting the type of case in which a special needs trust might be warranted or helpful. The presenter will cover situations in which a client might be missing out on possible benefits and what types of benefits are available to individuals with disabilities.<br>Grayson Cannon, Gullett Sanford Robinson & Martin |
| 12:30 – 2:30 p.m. | **Lunch / Topgolf Bays Open** |