

Topgolf: Estate Planning Tee-off

Aug. 21, 2026 – Topgolf Nashville

Total Credits: 2.25 General, .75 Dual

Producer: Rob Malin, Pinnacle Financial Partners



This program features 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.

Structuring an Effective Initial Estate Planning Consultation

The initial consultation is the highest-leverage hour in the entire engagement. It sets scope, determines whether the prospect becomes a client, shapes drafting accuracy, and drives your fee. Presenters will walk through the full arc, from intake and preparation through the interview, difficult family conversations, issue spotting, and the signed engagement letter.

Ashley Stearns, Trail Coleman & Stearns

Rob Hazard, Hazard Law

10 – 10:15 a.m.

Break

10:15 – 11:15 a.m.

From Tee Box to Tax Trap: Estate Planning Tax Hazards for Tennessee Attorneys

Tennessee has no estate or inheritance tax – but that does not make a family's plan tax-free. This session will walk through the federal traps hiding inside routine Tennessee estate planning: deed changes that trade a step-up in basis for probate avoidance, quitclaim deeds that are not actually exempt from recordation tax, revocable trusts oversold as tax planning, grantor trust powers that are misdrafted more often than not, and the post-death filings a successor trustee never sees coming.

Charles Frazier, Frazier Law

Michael Goode, Lewis Thomason

11:15 – 11:30 a.m.

Break

11:30 a.m. – 12:15 p.m. DUAL	Unspoken Courtroom Etiquette This session examines the written and unwritten rules of etiquette for attorneys who appear in probate court. The presenters will draw on their own experiences as judicial officers and look to guidance found in the Davidson County Local Rules, Chamber Rules, Tennessee Rules of Professional Conduct and Tennessee Code of Judicial Conduct. Judge Andra Hedrick, Seventh Circuit Court of Davidson Co. Judy Lojek, Seventh Circuit Court of Davidson Co.
12:15 – 12:30 p.m.	Open Q&A All Presenters
12:30 – 2:30 p.m.	Lunch / Topgolf Bays Open