

# Topgolf: Estate Planning Tee-off

Aug. 31, 2022 – Topgolf Nashville



## Program Producer:

Ashley Stearns, Trail Coleman & Stearns

**Total Credits:** 3 General

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

9 – 10 a.m.

## Drive for Show, Put for Dough – Income Tax Considerations in Estate Planning

This session will cover income tax strategies to help you fine tune your game and better assist your clients.

Aaron Flinn, Waller Lansden Dortch & Davis

Newman Bankston, Egerton McAfee Armistead & Davis

10 – 11 a.m.

## An Overview of Medicaid Trust Planning

This session will provide an overview of Medicaid planning, including basics, best practices, trust designs, accounting and more.

J. Barry, Elder Law of Middle Tennessee

Jim Jarman, First Horizon

11– 11:15 a.m.

## Break

11:15 – 12:15 p.m.

## Estate Planning and Probate in Nine Holes

This session will tee you up on topics ranging from basic estate planning to complex considerations, including the recent legislation on receiverships in estate matters, and how to avoid common sand traps.

Ashley Stearns, Trail Coleman & Stearns

Jennifer Exum, Baker Donelson Bearman Caldwell & Berkowitz

12:15 – 12:30 p.m.

## Grab Lunch

12:30 – 2:30 p.m.

## Topgolf Bays Open