

2009 SYMPOSIUM PROGRAM SCHEDULE

Thursday, May 14 and Friday, May 15, 2009
Grand Ballroom, Kansas City Convention Center, Kansas City, Missouri

Thursday, May 14, 2009

8:00 AM	Registration	
8:30 AM	Life Insurance - Planning for Clients who are concerned about Money	<i>Charles L. Ratner • Ernst & Young LLP • Cleveland, OH</i>
9:20 AM	Hot Topics and Current Developments that are Essential for the Practical Implementation of Transfer Planning Strategies	<i>Stephen R. Akers • Bessemer Trust Company • Dallas, TX</i>
10:25 AM	Pass Thru Entities and Income Tax Planning for the Closely-Held Business	<i>Samuel A. Donaldson • University of Washington School of Law • Seattle, WA</i>
11:15 AM	Estate Planning for Couples in a Second Marriage	<i>Eric A. Manterfield • Krieg Devault LLP • Noblesville, IN</i>
12:05 PM	Luncheon (included in fee)	
1:05 PM	Generation Skipping Transfer Tax Update	<i>Julie K. Kwon • Stanford University • Stanford, CA</i>
1:55 PM	Choosing Among the Private Foundation, Donor Advised Fund and Supporting Organization	<i>Victoria B. Bjorklund • Simpson Thacher & Bartlett LLP • New York, NY</i>
3:15 PM	Asset Protection Planning Including Offshore Trusts	<i>Elizabeth M. Schurig • Giordani Schurig Beckett & Tackett LLP • Austin, TX</i>
4:05 PM	Ethics in Estate Planning	<i>Will Frazier • Howard Frazier Barker Elliot Inc. • Dallas, TX</i>
4:50 PM	Adjourn	

Friday, May 15, 2009

7:30 AM	Ethical Issues and Conflict of Interest for the Estate Planning Professional	<i>Michael V. Bourland • Bourland, Wall & Wenzel, P.C. • Ft. Worth TX</i>
8:20 AM	Recent Developments Affecting Estate Planning	<i>Stanley M. Johanson • University of Texas School of Law • Austin, TX</i>
9:25 AM	Decanting Trusts	<i>Susan Porter • U.S. Trust • New York, NY</i>
10:15 AM	Qualified Plans Favoring Business Owners: Selection and Planning Ideas	<i>David Weaver • Edward Jones • St. Louis, MO</i>
11:15 AM	Practical Estate Planning in 2009: What Works Today and What Does Not	<i>Charles D. "Skip" Fox IV • McGuire Woods LLP • Charlottesville, VA</i>
12:10 PM	Adjourn	

Optional complimentary half day program with lunch sponsored by the Greater Kansas City Community Foundation
Additional 2 CLE Hours (You must indicate you are attending in advance)

12:30 PM	Box Lunch sponsored by the Greater Kansas City Community Foundation	
1:00 PM	Perfecting Donor Intent with a Gift Agreement	<i>Eric A. Manterfield • Krieg Devault LLP • Noblesville, IN</i>
1:50 PM	Fiduciary Duties and Potential Liabilities Relating to Charitable Entities: Planners' Toolbox of Basic Fiduciary Responsibility	<i>Michael V. Bourland • Bourland, Wall & Wenzel, P.C. • Ft. Worth TX</i>
2:40 PM	Adjourn	

For more information contact UMKC School of Law Continuing Legal Education at www.kceps.org or www.law.umkc.edu/cle/ or call 816-235-1648

2009 SYMPOSIUM REGISTRATION FORM

FEE: \$295

Please make check payable to the **Kansas City Estate Planning Symposium** and mail to: Continuing Legal Education, UMKC School of Law, 5100 Rockhill Road, Law Suite 028, Kansas City, MO. 64110-2499.

If you have questions please call **(816) 235-1648**.

Enclosed is \$ _____ for _____ registration(s) for the Kansas City Estate Planning Symposium, Thursday, May 14 and Friday, May 15, 2009 at the Grand Ballroom, Kansas City Convention Center, 301 W. 13th Street, Kansas City, Missouri.

I will attend the optional program sponsored by the GKCCF on Friday afternoon

Attendee Name (please print) _____

Firm _____

Address _____

City, State, ZIP _____

Firm or Company Phone _____

E-mail _____

FAX _____

Provide E-mail and FAX numbers only if you wish to receive E-mail or FAX notification of future seminars.

Registrant's Identification (Please Check All That Apply)

Attorney CPA Life Insurance Professional CFP® Trust Officer

Nonprofit Consultant Other (please specify) _____

Credit Card Payment

Visa MasterCard Discover

Cardholder Name _____
(as it appears on the card)

Card Number _____ Expiration _____

CPA Credit Information

Sponsor: UMKC/CLE Course Level: Update No prerequisites

Recommended CPE: Pending (2.0 ethics possible) UMKC/CLE is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Ave. North, Ste 700, Nashville, TN, 37219-2417. Web site: www.nasba.org

Cancellations and refund policy: We understand that conflicts arise. Refunds will be given for cancellations received 48 hours or more prior to the beginning of the program. Later cancellations and no shows will receive program materials on request. For more information, please contact our office at 816-235-1648.

You can also register online at: www.kceps.org or www.law.umkc.edu/cle/



**ESTATE PLANNING
SYMPOSIUM**

University of Missouri-Kansas City
Continuing Legal Education
5100 Rockhill Road
Kansas City, MO 64110-2499

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Make Reservations Now!

The Estate Planning Society of Kansas City, in cooperation with the
University of Missouri-Kansas City School of Law/ Continuing Legal Education, presents:



ESTATE PLANNING SYMPOSIUM

Thursday, May 14 and Friday, May 15, 2009

Grand Ballroom
Kansas City Convention Center
(H. Roe Bartle Hall)
301 W. 13th Street
Kansas City, Missouri



*Downtown
Location*



*Comfortable
Seating*



*Visit the web site
for more information:
www.kceps.org*

**CLE Credit Hours - Missouri: 13 hours ; Kansas, Iowa and Oklahoma:
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Registration Form Inside