

43rd Annual Notre Dame Tax & Estate Planning Institute
Thursday, October 26, 2017

Time	Topic	Speaker	Topic	Speaker
8:00-8:10	Greeting	Dean and Director		
8:10-8:15	<i>Break</i>			
	<i>Track A</i>		<i>Track B</i>	
8:15-9:15	Charitable Planning With Retirement Accounts: Benefits And Obstacles	Professor Christopher Hoyt	Using Non-Judicial Settlements: Your Irrevocable Trust Is Not Set In Stone	Pamela Lucina and Todd Flubacher
9:15-10:15	Practical Planning For Digital Assets And Administration Of Digital Assets By Fiduciaries	Professor Gerry Beyer	High Returns And Tax-Free Compounding: Keys To Building Wealth And Achieving The Best Estate Planning	Jonathan Blattmachr and Professor Jeff Glickman
10:15-10:30	<i>Break</i>			
10:30-11:30	The Generation Skipping Transfer Minefield: Persistent Traps And Pitfalls	David Handler and Joseph Higgins	Choices In Preparing Decedent's Final Form 1040, Estate's Initial Form 1041 And Decedent's Form 706: Maximizing Tax Savings And Satisfying Beneficiaries	David Kirk
11:30-12:30	Protecting Your Client's Data: Ethics, Security and Practicality *	David Ries	Challenges and Dilemmas When Dealing With Individuals With Diminished Capacity *	George Karibjanian
12:30-1:45	<i>Luncheon</i>			
1:45-2:45	How Interest Rates Affect Commonly-Used Estate Tax and Income Tax Planning Strategies	Diana Zeydel	Drafting Superior GRATs And Deciding If Certain Asset Classes Are Appropriate for a GRAT	David Handler and David Herzig
2:45-3:45	Reciprocal Trusts: Language That Causes Problems And Reciprocal Consideration	Domingo Such	A Rapid Fire Of Twenty Practical Estate Planning Nuggets	Martin Shenkman
3:45-4:00	<i>Break</i>			
4:00-5:40	Planning For Uncertainty: Should Clients Continue To Implement Planning Techniques? Changing Irrevocable Trusts. Drafting Flexible Trusts	Susan Lipp, Kim Kamin, David Handler, and Diana Zeydel	None	

Friday, October 27, 2017

Time	Topic	Speaker	Topic	Speaker
8:00-9:00	Current Developments Of Importance To Estate Planners	Professor Stanley Johanson	None	
9:00 -9:05	<i>Break</i>			
	<i>Track A</i>		<i>Track B</i>	
9:05-10:05	Succession Planning For The Family Business With Active and Passive Children As Co-Owners	Mary O'Reilly and Steven Breitstone	Transfer Techniques For Real Estate That Can Avoid Probate	Pamela Orsak
10:05-10:15	<i>Break</i>			
10:15-11:15	An Analysis of Proposals Using Life Insurance: What Works, What May Not Be As Effective As Promoted and What Does Not Work	Larry Macklin	Momma Always Liked You Best: Mediation As An Alternative For Estate And Trust Disputes	Robert Kirkland
11:15-12:15	Removal and Surcharge of Fiduciaries: Practicality, Obstacles and Defending the Fiduciary *	Sandra Glazier	Silent Trusts: Balancing Competing Interests And Implementing The Settlor's Intentions *	Nicole Mann, Jane Zhao and Jared Cloud
12:15-1:15 Luncheon	A 50-Year View Of The Profession And The Future Of The Profession	Professor Stanley Johanson		
1:15-2:15	Testamentary And Transfer Planning In A Period Of Uncertainty, Including Uses of Defined Value Clause (And Potential Attacks)	Steve Akers	Pre-Sale Due Diligence: Getting Your Business Ready To Sell.	Karin Prangly and Michael Sorrow
2:15-3:15	Valuation: Privileges When Hiring Appraisers, Preparing Gift And Estate Tax Returns With An Audit Probability And Impact Of Potential Income Taxes	Stephanie Loomis-Price	How Courts Unravel Asset Protection Trust Strategies And Protecting Your Trust	Louis Harrison
3:15-3:30	<i>Break</i>			
3:30-4:30	Income Tax Strategies For Trusts: Assignment Of Income To Taxpayers In Lower Income Tax Brackets, Including State	Neil Schoenblum	Win, Win Strategies For Donor Centric Charitable Giving	Ed Beckwith

	Income Taxes			
4:30-5:30	The Future Has Arrived: Are You Ready For Electronic Wills? *	Bruce Stone	Aggressive Tax Planning And The Ethical Advisor: Beyond Zealous Advocacy, What To Do When The Referral Proposes Questionable Structures. *	Stuart Kohn

(Wednesday Session)
3:30 pm to 5:30 pm

What Every Estate Planner Needs To Know About Federal
Bankruptcy Law. Alan Gassman

* Ethics credits are tentative, depending on the different professional accrediting
bodies for each state.