THE 24TH ANNUAL
ESTATE & CHARITABLE
GIFT PLANNING INSTITUTE

September 21, 2016 10:00 a.m.- 4:30 p.m. EST

Presented by **Ann B. Burns and Samuel A. Donaldson**

REGISTRATION & WELCOME – 10:00 a.m. to 10:30 a.m.

SESSION I – 10:30 a.m. to 12:00 p.m.

Recent Developments in the Federal Tax Laws Samuel A. Donaldson

The annual check-up begins with a complete overview of recent developments in federal income, estate and gift tax laws. This thorough and entertaining review of current statutes, regulations, rulings, and case law of interest to estate and charitable planners will include:

- Charitable planning techniques recently made permanent
- Dealing with the new basis consistency requirements and reporting rules
- Update on the use of conservation easements and façade easements
- New developments in the use of *Crummey* powers

ETHICS SESSION – 12:00 p.m. to 1:00 p.m.

The Annual Check-Up Ann B. Burns

The annual check-up is the perfect time to review whether new conflicts have arisen and to refresh client communications on ethical issues. This ethics session will include a review of current rulings and cases around the country on ethics topics including:

- Technology's impact on attorney's ethical obligations
- Heightening staff's awareness of loss prevention issues
- Joint representation of spouses and family members in estate planning
- Conflicts that arise during the course of representation

LUNCH – 1:00 p.m. to 2:00 p.m.

SESSION II – 2:00 p.m. to 4:00 p.m.

Conducting the Annual Estate Planning Check-Up

Ann B. Burns and Samuel A. Donaldson

The adage that prevention is the best cure applies to your clients' estate plans as well as our health. Nothing substitutes for an annual review to catch mistakes, assess changes in the law, become aware of changes in clients' circumstances, and anticipate future concerns. Ann and Sam will walk through the elements of an annual review of a client's estate plan, including:

- Assessing a plan's health
- Determining the impact of law changes
- Checking for conflicts and other ethics issues
- Using checklists to weigh a plan's fitness

SESSION III – 4:00 p.m. to 4:30 p.m.

Wrap-up Discussion/Q&A Ann B. Burns and Samuel A. Donaldson

CONCLUSION – 4:30 p.m.

Introducing the Faculty

Ann B. Burns, J.D.

Chair of the Trust, Estate and Charitable Planning Group

Gray Plant Mooty

Ann's practice focuses on estate and charitable planning, business succession planning, estate and trust administration, and fiduciary and tax litigation. Ann brings a unique mix of skills to her law practice as a certified public accountant and attorney. She represents multigenerational families of wealth throughout the country and individual and corporate trustees in estate planning, fiduciary, and tax matters.

Ann graduated from the University of Wisconsin Law School and clerked for the Honorable Donald R. Ross, on the Eighth Circuit U.S. Court of Appeals.

Ann is a frequent lecturer at national estate planning conferences and has been quoted in *The New York Times* and *Forbes* magazine. She chairs the board of a private client family office and is a member of the Board of Regents of the American College of Trust and Estate Counsel and the Board of Trustees of The Minneapolis Foundation.

Samuel A. Donaldson, J.D., LL.M.

Professor of Law

Georgia State University - Atlanta, Georgia

Prior to joining the Georgia State faculty in 2012, he was on the faculty at the University of Washington School of Law for 13 years. During his tenure at the University of Washington, he was a five-time recipient of the Philip A. Trautman Professor of the Year award from the School of Law's Student Bar Association. Professor Donaldson served for two years as Associate Dean for Academic Administration and for six years as the Director of the law school's Graduate Program in Taxation. He teaches a number of tax and estate planning courses, as well as courses in the areas of property, commercial law and professional responsibility.

Professor Donaldson is an Academic Fellow of the American College of Trust and Estate Counsel (ACTEC) and a member of the Bar in Washington, Oregon, and Arizona. Among his scholarly works, he is a co-author of the West casebook, *Federal Income Tax: A Contemporary Approach,* and a co-author of the *Price on Contemporary Estate Planning* treatise published by CCH. Professor Donaldson has served as the Harry R. Horrow Visiting Professor of International Law at Northwestern University and a Visiting Assistant Professor at the University of Florida Levin College of Law.

Continuing Education Credit Information

CLE, CPE, CFP® and CTFA continuing education credits are pending approval, including one hour of ethics for CLE, CPE, and CTFA. Credit hours vary from state to state.

Please contact Amy at: amyjsavage@yahoo.com for your state accreditation.

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