

39th Annual

McKernan Law Auditorium, LSU Law Center

Estate Planning Seminar

Thursday, October 8, 2009

8:00-8:55 a.m.

Registration and Continental Breakfast (provided)

8:55-9:00 a.m.

Welcome

Sidney M. Blitzer, Jr. (Program Chair)

9:00-10:00 a.m.

(1.0 credit)

Considerations for Drafting Trust Administration and Executor Provisions

Charlotte K. Ray

JP Morgan Chase Bank, NA, Baton Rouge

10:00-10:10 a.m.

Break

10:10-11:10 a.m.

(1.0 credit)

Mediation in Trust and Will Controversies

Marguerite L. Adams

Liskow & Lewis, PLC, New Orleans

Thomas K. Foutz

ADR, Inc., Metairie

11:10-11:20 a.m.

Break

11:20 a.m.-12:20 p.m.

(1.0 credit)

Planning, Drafting and Administering Special Needs Trusts

Joel A. Mendler

Sirote & Permutt, P.C., Birmingham, AL

12:20-1:00 p.m.

Boxed Lunch (provided)

1:00-2:00 p.m.

(1.0 credit)

Engagement Letters for Estate Planning Matters, Including Wills, Trusts and Successions (Ethics credit)

William C. Kalmbach, III

Cook, Yancey, King & Galloway, Shreveport

2:00-2:10 p.m.

Break

2:10-3:10 p.m.

(1.0 credit)

Philanthropy: A Practical Approach to Planning Choices

Mary C. Hester

Taylor, Porter, Brooks & Phillips, LLP, Baton Rouge

Thomas B. Lemann

Liskow & Lewis, PLC, New Orleans

Jacquelyn L. Morton

Tulane University, New Orleans

3:10-3:20 p.m.

Break

3:20-4:35 p.m.

(1.25 credits)

Recent Developments in Successions & Donations

Joseph W. Mengis

Perry, Atkinson, Balhoff, Mengis & Burns, LLC, Baton Rouge

Friday, October 9, 2009

- 8:00-9:00 a.m.** **Registration and Continental Breakfast (provided)**
- 9:00-10:00 a.m.**
(1.0 credit) **Grantor Trusts: What are they? How do they work? Why would you choose to use them?**
Jonathan Katz
Jones, Walker, Waechter, Poitevent, Carrère & Denègre, LLP, New Orleans
- 10:00-10:10 a.m.** **Break**
- 10:10-11:10 a.m.**
(1.0 credit) **Defending Trustees in Connection With Their Duties and Liabilities**
Samantha P. Griffin
Stone Pigman Walther Wittmann, LLC, New Orleans
- 11:10-11:20 a.m.** **Break**
- 11:20 a.m.-12:20 p.m.** **Estate Planning for Clients with Land, Timber and Minerals**
(1.0 credit) Donald A. Capretz, APLC, Lafayette
- 12:20-1:00 p.m.** **Boxed Lunch (provided)**
- 1:00-2:00 p.m.**
(1.0 credit) **Professionalism**
The Honorable Daniel E. Knowles, III
United States Magistrate Judge, Eastern District of Louisiana
- 2:00-2:10 p.m.** **Break**
- 2:10-3:10 p.m.**
(1.0 credit) **Representing Clients with Diminishing Capacity**
Roselyn B. Koretzky
Milling Benson Woodward, LLP, New Orleans

Sheila L. Moragas
Milling Benson Woodward, LLP, New Orleans
- 3:10-3:20 p.m.** **Break**
- 3:20-4:35 p.m.**
(1.25 credits) **Recent Developments in Federal Estate, Gift and Generation-Skipping Transfer Taxation**
Jeffrey W. Koonce
Phelps Dunbar LLP, Baton Rouge

LSUcle deeply appreciates the generosity of the Planning Committee and speakers who volunteer their time and expertise toward the goal of presenting a program of the very highest quality.

The attendance fee includes seminar materials (electronically), continental breakfast, lunch, coffee and refreshments. Seminar materials will be posted online approx. one week before the seminar. We will send you a link to the materials by email, so be sure to include your email address on the registration form. Note: LSU will not sell or share your email address with third parties. To view the materials electronically during the seminar, we suggest that you download the materials to a laptop computer, as internet access may not be available at the seminar.

A printed book can be purchased for an additional \$30. Make your selection on the registration form. Note: The book fee is non-refundable after October 1, 2009.

By the way, the law student parking lots will be **WIDE OPEN** and available for seminar parking. There are no law school classes scheduled on October 8-9.

39th Annual Estate Planning Seminar October 8-9, 2009

NAME _____
 FIRM _____
 ADDRESS _____
 CITY _____ State _____ Zip _____
 PHONE () _____ FAX () _____
 E-MAIL* _____ LA BAR # _____

* LSUcle does not sell e-mail addresses.

Are you an LSU Law Alumnus? Yes/No _____
 If so, what year did you graduate? _____

Seminar Materials Selection:

I would like to purchase a printed book and have added \$30 to my payment. I understand that the book fee is non-refundable after Oct. 1, 2009.

Registration Fees:


- Full Seminar* (12.5 hrs.) \$379
 \$359 thru Oct. 1
 \$409 On-Site (w/book)
- Thursday only* (6.25 hrs.) \$289
 \$269 thru Oct. 1
 \$319 On-Site (w/book)
- Friday only* (6.25 hrs.) \$289
 \$269 thru Oct. 1
 \$319 On-Site (w/book)
- Ethics & Professionalism only \$90
- Ethics only \$45
- Professionalism only \$45

* Price includes an entire set of all seminar materials posted online in electronic format.

4 Easy Ways to Register:

-  **REGISTER ONLINE NOW!** www.LSUcle.org
 (credit card payment only)
-  Mail this form with payment to: **LSUcle**
 (payable to LSU) **W203 LSU Law Center**
Baton Rouge, LA 70803
-  Fax this form with payment to: **225.578.5842**
 (credit card payment only)
-  Call us to register by phone: **225.578.5837**
 (credit card payment only)

Unable to Attend? Purchase the Course Materials.

 Check here and submit this form with payment to the address above. Book will be shipped after seminar.

Printed Materials \$60

Select your credit card type:



Card #	
Expires	
Signature	

FOR OFFICE USE ONLY		Fax					
Amount \$		Pay Code		Check #		Rec'd	

GENERAL INFORMATION

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Cancellation Policy

Cancellation requests must be received in our office in writing, by fax or mail, no later than 4:30 p.m., October 1, 2009 to receive a refund less a \$50 cancellation fee. Requests must be addressed to our office: LSUcle, W203 LSU Law Center, Baton Rouge, LA 70803, and may be faxed to

(225) 578-5842 or e-mailed to lsucle@law.lsu.edu.

Additional Information

- People with Special Needs: Call us at (225) 578-5837 with your requests.
- Tape Recorders: Tape recording is prohibited.
- Publications: Written materials may be purchased after the seminar. Use the registration form above (see checkbox) or call (225) 578-5837 for more information.
- Things to do, places to see in Baton Rouge: For information, visit
 - www.visitbatonrouge.com
 - www.2theadvocate.com

PARKING NOTICE

The law student parking lots will be **WIDE OPEN** and available for seminar parking. There are no law school classes scheduled on these seminar dates.