

# 42nd Annual Estate Planning Seminar

McKernan Law Auditorium, LSU Law Center

Thursday, October 25, 2012

- 7:30-8:40 a.m.**      **Registration and Continental Breakfast (sponsored by Argent Financial Group, Inc., Ruston, LA)**
- 8:40-8:45 a.m.**      **Welcome**  
Sidney M. Blitzer, Jr. (Program Chair)  
Kantrow, Spaht, Weaver & Blitzer, A P.L.C., Baton Rouge
- 8:45-10:00 a.m.**      **Recent Developments in Successions & Donations\***  
(1.25 credits)  
Joseph W. Mengis  
Perry, Atkinson, Balhoff, Mengis & Burns, L.L.C., Baton Rouge
- 10:00-10:10 a.m.**      **Break**
- 10:10-11:10 a.m.**      **How to Handle an Estate Planning Practice**  
(1.0 credit)  
Carole Cukell Neff  
Sessions, Fishman, Nathan & Israel, L.L.C., New Orleans
- 11:10-11:20 a.m.**      **Break**
- 11:20 a.m.-12:20 p.m.**      **Prenuptial Agreements**  
(1.0 credit)  
Professor Elizabeth R. Carter  
LSU Law Center
- 12:20-1:30 p.m.**      **Lunch at the LSU Faculty Club (sponsored by Capital One NA – Trust & Asset Management, Baton Rouge, LA)**
- 1:30-2:30 p.m.**      **P.O.D. and Similar Registrations of Bank Accounts, Stocks and Bonds, etc.**  
(1.0 credit)  
J. Benjamin Warren  
Ayres, Warren, Shelton & Williams, LLC, Shreveport
- 2:30-2:40 p.m.**      **Break**
- 2:40-3:40 p.m.**      **Legal Ethics\***  
(1.0 credit)  
Professor Greg Smith  
Vice Chancellor for Business & Finance  
Professional Ethics Professorship of Law  
LSU Law Center
- 3:40-3:50 p.m.**      **Break**
- 3:50-5:05 p.m.**      **Recent Developments in Taxation of Interest to Estate Planners**  
(1.25 credits)  
Jeffrey W. Koonce  
Phelps Dunbar LLP, Baton Rouge

\*Applied for 1 credit hour of Louisiana Title Insurance continuing education

**Friday, October 26, 2012**

- 7:30-8:45a.m.**      **Registration and Continental Breakfast (sponsored by IBERIABANK Wealth Advisors, Birmingham, AL)**
- 8:45-9:45 a.m.**      **Drafting for Flexibility Under the Louisiana Trust Code**  
(1.0 credit)      Miriam Wogan Henry  
Jones, Walker, Waechter, Poitevent, Carrère & Denègre, L.L.P., New Orleans
- 9:45-9:55 a.m.**      **Break**
- 9:55-10:55 a.m.**      **Special Planning Concerns For Older Clients**  
(1.0 credit)      Joel A. Mendler  
Baldwin Haspel Burke & Mayer, LLC, New Orleans
- 10:55-11:05 a.m.**      **Break**
- 11:05 a.m.-12:05 p.m.**      **Limited Liability Companies – General Considerations and Issues and Provisions for Operating Agreements when Estate Taxes are not a Concern**  
(1.0 credit)      John B. Landry, Jr.  
McNew, King, Mills, Burch & Landry, LLP, Monroe
- 12:05-1:15 p.m.**      **Lunch at the LSU Faculty Club (sponsored by Whitney Bank – Trust & Asset Management, New Orleans, LA)**
- 1:15-2:15 p.m.**      **Professionalism\***  
(1.0 credit)      The Honorable S. Maurice Hicks, Jr.  
Judge, U.S. District Court, Western District of Louisiana  
Shreveport Division
- 2:15-2:30 p.m.**      **Break**
- 2:30-3:30 p.m.**      **When the Prodigal Son Doesn't Return Home: Planning for Troubled Heirs**  
(1.0 credit)      Kyle C. McInnis  
Cook, Yancey, King & Galloway, A P.L.C., Shreveport
- 3:30-4:30 p.m.**      **Planning to Diminish the Likelihood of Undue Influence, and Responding if it Begins to Happen**  
(1.0 credits)      Sheila L. Moragas  
Milling Benson Woodward L.L.P., New Orleans

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

## **Sponsors**

**Argent Financial Group, Inc., Ruston, LA**  
**Capital One NA – Trust & Asset Management, Baton Rouge, LA**  
**Chaffe & Associates, Inc., New Orleans, LA**  
**IBERIABANK Wealth Advisors, Birmingham, AL**  
**Whitney Bank – Trust & Asset Management, New Orleans, LA**



Stay abreast of the very latest developments and hottest tips in estate planning today and help your clients plan for tomorrow. This seminar is designed to provide timely and relevant information to lawyers, financial planners, and accountants dealing with the complexities of estate planning.

Non-Profit Org.  
U.S. Postage  
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Baton Rouge, LA

LSUcle's Annual Estate Planning Seminar, now in its 42nd year, is one of the longest-running seminars of its kind in the country. Would you please join us on October 25-26?

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### Planning Committee

Sidney M. Blitzer, Jr. (Program Chair)  
Kantrow, Spaht, Weaver & Blitzer, APLC, Baton Rouge, LA

Mary C. Hester  
Taylor, Porter, Brooks & Phillips, LLP, Baton Rouge, LA

John C. Blackman, IV  
Jones, Walker, Waechter, Poitevent, Carrère & Denègre, L.L.P., Baton Rouge, LA

John B. Landry, Jr.  
McNew, King, Mills, Burch & Landry, LLP, Monroe

Dorrell J. Brister  
Gold, Weems, Bruser, Sues & Rundell, APLC, Alexandria, LA

W. Deryl Medlin  
McMichael, Medlin, D'Anna, Wedgeworth & Lafargue, L.L.C., Shreveport

Professor Elizabeth R. Carter  
LSU Law Center, Baton Rouge

David L. Sigler  
David L. Sigler & Associates, Lake Charles

Miriam Wogan Henry  
Jones, Walker, Waechter, Poitevent, Carrère & Denègre, L.L.P., New Orleans, LA

**Registration includes seminar materials in electronic format. 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: LSUcle 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 18, 2012.

**LSUcle**

Center of Continuing Professional Development  
W203 LSU Law Center  
Baton Rouge, LA 70803-0001



# 42nd Annual Estate Planning Seminar

## October 25-26, 2012

### LSU Law Center

#### UPCOMING PROGRAMS

**Recent Developments in Legislation & Jurisprudence**  
September 7-8, 2012, Crowne Plaza Hotel, Baton Rouge

**Recent Developments in Legislation & Jurisprudence**  
September 13-14, 2012, Shreveport Convention Center

**16th Annual Family Law Seminar**  
September 20-22, 2012, Embassy Suites Hotel, Baton Rouge

**Recent Developments in Legislation & Jurisprudence**  
October 4-5, 2012, Cajundome Convention Center, Lafayette

**18th Annual Bankruptcy Law Seminar**  
October 11-12, 2012, LSU Law Center

**20th Institute on Real Estate Law**  
October 19, 2012, LSU Law Center

**Recent Developments in Legislation & Jurisprudence**  
November 2-3, 2012, LSU Law Center

**Recent Developments in Legislation & Jurisprudence**  
November 8-9, 2012, Monroe Convention Center

**Recent Developments in Legislation & Jurisprudence**  
November 15-16, 2012, L'Auberge du Lac Resort, Lake Charles

**Recent Developments in Legislation & Jurisprudence**  
November 29-30, 2012, Kenner Pontchartrain Center

**Recent Developments in Legislation & Jurisprudence**  
December 7-8, 2012, New Orleans Marriott at the Convention Center

**CLE by the Hour**  
December 12-14, LSU Law Center

www.**LSUcle**.org



**LSUcle**

42nd Annual

# Estate Planning Seminar

October 25-26, 2012

**LSU Law Center**  
McKernan Law Auditorium  
Baton Rouge, LA



- Recent Developments in Successions & Donations
- How to Handle an Estate Planning Practice
- Prenuptial Agreements
- P.O.D. and Similar Registrations of Bank Accounts, Stocks and Bonds, etc.
- Recent Developments in Taxation of Interest to Estate Planners
- Drafting for Flexibility Under the Louisiana Tax Code
- Special Planning Concerns For Older Clients
- LLC's - General Considerations/Issues/Provisions for Operating Agreements
- Planning for Troubled Heirs
- Planning to Diminish the Likelihood of Undue Influence, and Responding if it Begins to Happen
- Ethics
- Professionalism

FULL YEAR of CLE credits  
Louisiana legal specialization credit (12.5 hrs.) has been approved in the areas of Tax Law and Estate Planning & Administration.  
Also, 3 hrs. of Title Insurance CE credit applied for.

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REGISTER ONLINE TODAY

www. **LSU** cle .org

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October 25-26, 2012**

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? \_\_\_\_\_

**Registration Fees:**

- I would like a **PRINTED BOOK** and have added \$30 to my payment. I understand that the book fee is non-refundable after October 18, 2012.
- Full Seminar\* (12.5 hrs.) \$429  
\$409 thru Oct. 18  
\$459 On-Site (w/book)
- Thursday only\* (6.5 hrs.) \$309  
\$289 thru Oct. 18  
\$339 On-Site (w/book)
- Friday only\* (6.0 hrs.) \$309  
\$289 thru thru Oct. 18  
\$339 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. If you want a printed book please be sure to check the appropriate box under "Registration Fees" and add \$30 to your payment.

NOTE: Walk-in registrations include a printed book by default

**3 Easy Ways to Register:**

- REGISTER ONLINE NOW!** (credit card payment only) [www.LSUcle.org](http://www.LSUcle.org)
- Mail this form with payment to: **LSUcle W203 LSU Law Center Baton Rouge, LA 70803** (credit card or check payable to LSU)
- Fax this form with payment to: **225.578.5842** (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 \$100



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**GENERAL INFORMATION**

Registration 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.

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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 18, 2012 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 for delivery after 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](http://www.visitbatonrouge.com)
  - [www.2theadvocate.com](http://www.2theadvocate.com)



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