

# 43rd Annual Estate Planning Seminar

McKernan Law Auditorium, LSU Law Center

Thursday, October 10, 2013

<b>7:30-8:40 am</b>	<b>Registration and Continental Breakfast</b>
<b>8:40-8:45 am</b>	<b>Welcome</b> John C. Blackman, IV (Program Chair) Jones, Walker, Waechter, Poitevent, Carrère & Denègre, L.L.P., Baton Rouge, LA
<b>8:45-10:00 am</b> (1.25 credit hrs.)	<b>Successions &amp; Donations*</b> Joseph W. Mengis Perry, Atkinson, Balhoff, Mengis & Burns, L.L.C., Baton Rouge
<b>10:00-10:10 am</b>	<b>Break</b>
<b>10:10-11:10 am</b> (1.0 credit hr.)	<b>Professionalism*</b> Donald W. Weir, Jr. Attorney at Law, Shreveport
<b>11:10-11:20 am</b>	<b>Break</b>
<b>11:20 am-12:20 pm</b> (1.0 credit hr.)	<b>Problem Issues in Handling Successions*</b> Carole Cukell Neff Sessions, Fishman, Nathan & Israel, L.L.C., New Orleans
<b>12:20-1:30 pm</b>	<b>Lunch at the LSU Faculty Club</b>
<b>1:30-2:30 pm</b> (1.0 credit hr.)	<b>Beneficiary Designations</b> Jane E. Armstrong Phelps Dunbar LLP, New Orleans
<b>2:30-2:40 pm</b>	<b>Break</b>
<b>2:40-3:40 pm</b> (1.0 credit hr.)	<b>Family Business Succession Planning</b> Donald A. Capretz Donald A. Capretz, PLC, Lafayette
<b>3:40-3:50 pm</b>	<b>Break</b>
<b>3:50-5:05 pm</b> (1.25 credit hrs.)	<b>Recent Developments in Taxation of Interest to Estate Planners</b> Jeffrey W. Koonce Phelps Dunbar LLP, Baton Rouge

\*Also approved for 1 credit hour of Title Insurance CE by the Louisiana Dept. of Insurance

Friday, October 11, 2013

<b>7:30-8:40 am</b>	<b>Registration and Continental Breakfast</b>
<b>8:45-9:45 am</b> (1.0 credit hr.)	<b>Estate Planning for Oil &amp; Gas Interests*</b> Kyle C. McInnis Cook, Yancey, King & Galloway, PLC, Shreveport  Matthew R. May Cook, Yancey, King & Galloway, PLC, Shreveport
<b>9:45-9:55 am</b>	<b>Break</b>

9:55-10:55 am

(1.0 credit hr.)

### Discretionary Distributions

Miriam Wogan Henry

Jones, Walker, Waechter, Poitevent, Carrère & Denègre, L.L.P., New Orleans

10:55-11:05 am

### Break

11:05 am-12:05 pm

(1.0 credit hr.)

### Planning for Portability Under the 2012 Tax Act

Kenneth A. Weiss

McGlinchey Stafford, PLLC, New Orleans

12:05-1:15 pm

### Lunch at the LSU Faculty Club

1:15-2:15 pm

(1.0 credit hr.)

### Practical Estate Planning for Non-Traditional Relationships

Betty A. Raglin

Sigler & Raglin, PLLC, Lake Charles

2:15-2:30 pm

### Break

2:30-3:30 pm

(1.0 credit hr.)

### Ethics\*

Professor Greg Smith

Vice Chancellor for Business & Finance

Professional Ethics Professorship of Law

LSU Law Center

3:30-4:30 pm

(1.0 credit hr.)

### Living Wills and Health Powers of Attorney

Professor Elizabeth R. Carter

LSU Law Center

\*Also approved for 1 credit hour of Title Insurance CE by the Louisiana Dept. of Insurance

## 43rd Annual Estate Planning Seminar: October 10-11, 2013

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**\$6/day for Union Sq. Parking Garage next to Law Center (reg. rate \$1.50/hr)\***

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**Full Seminar** (12.5 hrs./full year) Select your materials preference

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☐ Ethics & Professionalism only

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☐ Professionalism only

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**\*Due to LSU parking policy changes, there is no longer a free, reserved lot. For more information, visit [www.lsucl.org/directions](http://www.lsucl.org/directions)**

#### NOTE:

- Walk-in registrations must pay the registration price for and receive hard-copy materials by default.
- PDF materials will be sent via email to the email you provide above if you select this option. Because neither internet access nor electrical outlets are guaranteed, we suggest that you either print or save the PDF materials to your desktop, and fully charge your batteries, if you wish to review them at the seminar.
- If you select hard-copy materials, they will be distributed upon check-in at the seminar.

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**225.578.5842**

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.

Our sincerest thanks go out also to our wonderful and faithful attendees for making this program the second longest running annual estate planning seminar in the country.

## Sponsors

**Argent Financial Group, Inc., Ruston, LA**  
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## Planning Committee

### John C. Blackman, IV (Program Chair)

Jones, Walker, Waechter, Poitevent, Carrère & Denègre, L.L.P.,  
Baton Rouge, LA

### Miriam Wogan Henry

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

### W. Deryl Medlin

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### Jeffrey W. Koonce

Phelps Dunbar LLP, Baton Rouge

### David L. Sigler

Sigler & Raglin, PLLC, Lake Charles

### Professor Elizabeth R. Carter

LSU Law Center, Baton Rouge

### John B. Landry, Jr.

McNew, King, Mills, Burch & Landry, LLP, Monroe

## GENERAL INFORMATION

**Questions?** Call us at (225) 578-5837.

### Course Materials for Attendees

**If you do not select your materials format on the registration form, you will receive your materials in PDF format via email.** PDF materials will be available approx. one week before the seminar. We will send you a link to the materials by email, so be sure to include your correct email address on the registration form. Note: LSUcle will not sell or share your email address with third parties. Because neither internet access nor electrical outlets are guaranteed, we suggest that you either print the PDF materials or save the PDF materials to your desktop, and fully charge your batteries, if you wish to review them at the seminar.

**The price for walk-in registrations includes a hard copy of the materials by default.**

**The registration fee with hard-copy materials is \$30 more than with PDF materials. You may not change your materials selection from hard-copy to PDF for a refund of the \$30 within 1 calendar week of the opening date of the seminar.**

### Cancellation Policy

Cancellation requests must be received in our office in writing, by fax or mail, no later than 4:30 p.m., 1 calendar week before the opening date of the seminar to receive a refund less a \$50 cancellation fee. Requests must be addressed to our office: LSUcle, LSU Law Bldg., Room W203, 110 Union Square, Baton Rouge, LA 70803-0106, and may be faxed to (225) 578-5842 or e-mailed to lsucle@law.lsu.edu.

### Additional Information

- Publications: Can't attend? Course Materials may be purchased for shipment after the seminar. Visit [www.lsucler.org/materials](http://www.lsucler.org/materials) for information on how to order.
- People with Special Needs: Call us at (225) 578-5837 with your requests.
- Tape Recorders: Tape recording is prohibited.
- LSU Football: Visit [www.lsusports.net](http://www.lsusports.net) for this year's football schedule.

## 2013 PROGRAMS

### Recent Developments in Legislation & Jurisprudence

September 6-7, 2013, LSU Law Center

### 17th Annual Family Law Seminar

September 12-14, 2013, Embassy Suites Hotel, Baton Rouge

### Recent Developments in Legislation & Jurisprudence

September 26-27, 2013, Shreveport Convention Center

### Recent Developments in Legislation & Jurisprudence

October 2-3, 2013, (Wed./Thurs.) L'Auberge du Lac Resort, Lake Charles

### 43rd Annual Estate Planning Seminar

October 10-11, 2013, LSU Law Center

### 19th Annual Bankruptcy Law Seminar

October 24-25, 2013, LSU Law Center

### Construction Law

November 1, 2013, LSU Law Center

### Recent Developments in Legislation & Jurisprudence

November 7-8, 2013, Cajundome Convention Center, Lafayette

### Recent Developments in Legislation & Jurisprudence

November 15-16, 2013, LSU Law Center

### Recent Developments in Legislation & Jurisprudence

November 21-22, 2013, Monroe Convention Center

### Recent Developments in Legislation & Jurisprudence

December 5-6, 2013, Kenner Pontchartrain Center

### Recent Developments in Legislation & Jurisprudence

December 13-14, 2013, New Orleans Marriott at the Convention Center

### CLE by the Hour

December 18-20, 2013 LSU Law Center



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*43rd Annual*

# Estate Planning Seminar

**October 10-11, 2013**

**LSU Law Center**

McKernan Law Auditorium  
Baton Rouge, LA

- Successions & Donations
- Problem Issues in Handling Successions
- Beneficiary Designations
- Family Business Successions Planning
- Recent Developments in Taxation
- Estate Planning for Oil & Gas Interests
- Discretionary Distributions
- Planning for Portability Under the 2012 Tax Act
- Practical Estate Planning for Non-Traditional Relationships
- Living Wills and Health Powers of Attorney
- Ethics
- Professionalism

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