

LSU cle

44th Annual

Estate Planning Seminar

October 9-10, 2014

LSU Law Center

McKernan Law Auditorium
Baton Rouge, LA

- Successions & Donations
- Practical End of Life Counseling
- Litigation Issues for the Estate Planner
- Life Insurance Uses and Issues
- Recent Developments in Taxation
- Estate Planning with Large Land Holdings
- Portability Planning
- Best Provisions in Estate Planning Documents
- Partnership Tax Issues
- Income Tax Aspects of Estate Planning
- Ethics
- Professionalism



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Approved for Tax Law and Estate Planning & Administration Specialization Credit
4.0 Title Insurance CE credits
Approved for Texas CLE credits

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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.

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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LSU Law Center, Baton Rouge

John B. Landry, Jr.

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

GENERAL INFORMATION

Course Materials for Attendees

You have a choice of convenient, PDF materials available approximately one week before the seminar or a bound, hard copy of the materials available for pick-up at check-in. Instructions on how to download PDF materials will be included in your confirmation letter, sent via email and snail mail immediately upon registration. 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.

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., on October 2, 2014, 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 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 for this year's football schedule.

2014 PROGRAMS

Recent Developments in Legislation & Jurisprudence

September 12-13, 2014, LSU Law Center

Recent Developments in Legislation & Jurisprudence

September 18-19, 2014, Shreveport Convention Center

18th Annual Family Law Seminar

September 25-27, 2014, Baton Rouge Marriott

Emerging Issues at the Intersection of Energy and Water

October 3, 2014, LSU Law Center

20th Annual Bankruptcy Law Seminar

October 23-24, 2014, LSU Law Center

Recent Developments in Legislation & Jurisprudence

October 30-31, 2014, Cajundome Convention Center, Lafayette

Recent Developments in Legislation & Jurisprudence

November 6-7, 2014, Monroe Convention Center

Recent Developments in Legislation & Jurisprudence

November 14-15, 2014, LSU Law Center

Recent Developments in Legislation & Jurisprudence

November 20-21, 2014, L'Auberge du Lac Resort, Lake Charles

Recent Developments in Legislation & Jurisprudence

December 4-5, 2014, Kenner Pontchartrain Center

Recent Developments in Legislation & Jurisprudence

December 12-13, 2014, New Orleans Marriott (555 Canal St.)

CLE by the Hour

December 17-19, 2014, LSU Law Center

Thursday, October 9, 2014

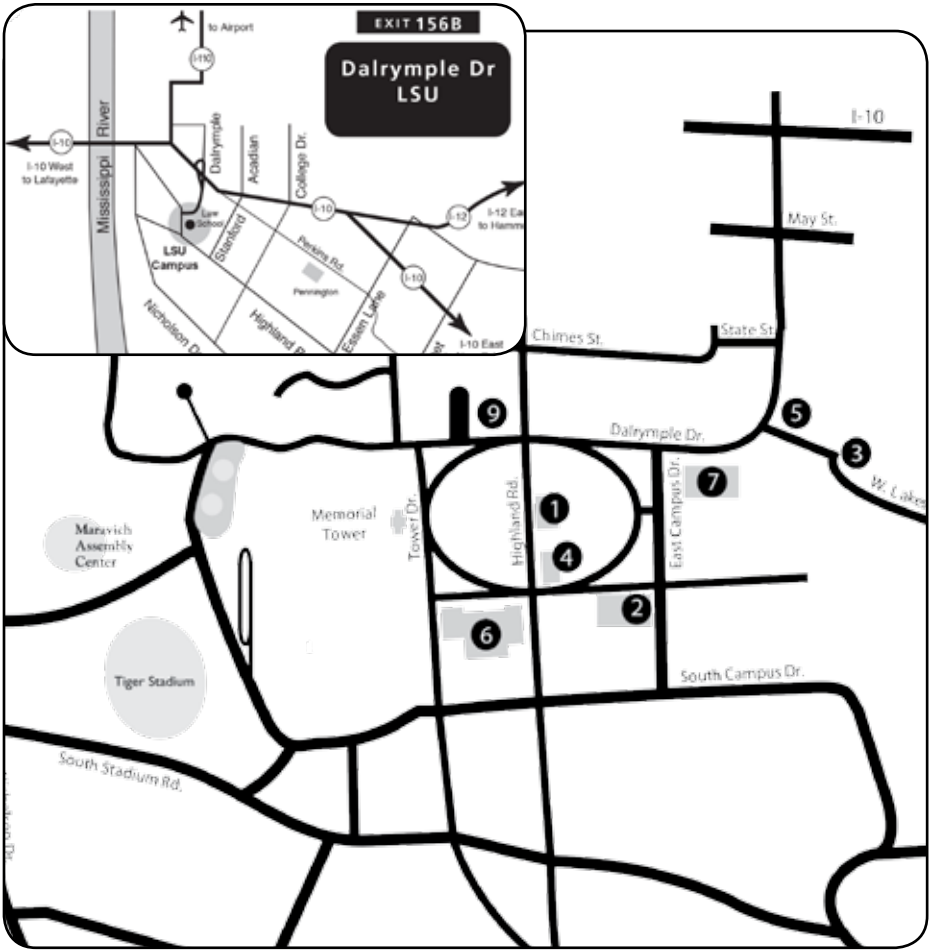
7:30-8:40 am	Registration and Continental Breakfast
8:40-8:45 am	Welcome John C. Blackman, IV (Program Chair) Jones Walker LLP, Baton Rouge, LA
8:45-10:00 am (1.25 credit hrs.)	Successions & Donations* Joseph W. Mengis Perry, Atkinson, Balhoff, Mengis & Burns, L.L.C., Baton Rouge
10:00-10:10 am	Break
10:10-11:10 am (1.0 credit hr.)	Practical End of Life Counseling Regan A. Forrester Director of Social Services Lambeth House, New Orleans, LA Linda S. Melancon, Esq. Legacy Center of Louisiana, LLC Prairieville, LA Susan E. Nelson, MD, FACP, FAAHPM Medical Director of Senior Services and PACE Baton Rouge Franciscan Missionaries of Our Lady Health System Baton Rouge, LA
11:10-11:20 am	Break
11:20 am-12:20 pm (1.0 credit hr.)	Litigation Issues for the Estate Planner (and How to Spot, Handle, and Avoid Them) D. Bruce Spizer Bruce Spizer, APLC, New Orleans
12:20-1:30 pm	Lunch at the LSU Faculty Club
1:30-2:30 pm (1.0 credit hr.)	Life Insurance Uses and Issues William C. Kalmbach, III Cook, Yancey, King & Galloway, APLC, Shreveport
2:30-2:40 pm	Break
2:40-3:40 pm (1.0 credit hr.)	Professionalism Boundaries* Betty A. Raglin Sigler & Raglin, PLLC, Lake Charles
3:40-3:50 pm	Break
3:50-5:05 pm (1.25 credit hrs.)	Recent Developments in Taxation of Interest to Estate Planners 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 10, 2014

7:30-8:40 am	Registration and Continental Breakfast
8:45-9:45 am (1.0 credit hr.)	The Only Thing That Lasts: Estate Planning with Large Land Holdings* Kyle C. McInnis Kean Miller, LLP, Shreveport
9:45-9:55 am	Break
9:55-10:55 am (1.0 credit hr.)	Portability Planning Steve R. Akers Senior Fiduciary Counsel, Southwest Region Bessemer Trust Company, N.A., Dallas, Texas
10:55-11:05 am	Break
11:05 am-12:05 pm (1.0 credit hr.)	Best Provisions in Estate Planning Documents Miriam Wogan Henry Jones Walker LLP, New Orleans John B. Landry, Jr. McNew, King, Mills, Burch & Landry, LLP, Monroe
12:05-1:15 pm	Lunch at the LSU Faculty Club
1:15-2:15 pm (1.0 credit hr.)	Ethics* Greg Smith Vice Chancellor for Business and Financial Affairs Professional Ethics Professor of Law G. Frank and Winston Purvis Professor of Law LSU Law Center
2:15-2:30 pm	Break
2:30-3:30 pm (1.0 credit hr.)	Partnership Tax Issues for Estate Planners Philip Hackney James E. and Betty M. Phillips Assistant Professor of Law LSU Law Center
3:30-4:30 pm (1.0 credit hr.)	Income Tax Aspects of Estate Planning B. Trevor Wilson Jones Walker LLP, Baton Rouge

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



Getting to the LSU Campus

From I-10, take the Dalrymple exit. Turn right at the bottom of the ramp, and follow Dalrymple for 1/2 mile onto campus.

Parking

Weekday parking in the Law Center lot is no longer allowed. Limited free parking is available in the North Fraternity Lot (#3 on map) located on W. Lakeshore. However, you must first obtain a temporary permit from the Visitor Center (#9 on map). Metered parking is available in the Union Square Parking Garage (#2 on map) for \$6/day if you purchase a parking tag, in advance, from LSUCle. Please indicate your desire to take advantage of this rate by checking the appropriate checkbox on your registration form or online registration page. Otherwise, onsite parking will cost \$1.50/hour.

Map Legend

- LSU Law Center..... 1**
- Union Square Parking Garage..... 2**
- North Fraternity Lot..... 3**
- Faculty Club..... 4**
- International Culture Center..... 5**
- LSU Union..... 6**
- University High School (U-High)..... 7**
- Lod Cook Alumni Center..... 8**
- Visitor Center..... 9**

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PLEASE PRINT CLEARLY:

Judge Ms. Mrs. Mr.

FIRST NAME _____ M.I. _____ LAST NAME _____ SUFFIX _____

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PLEASE SELECT A REGISTRATION OPTION BELOW

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

Day 1 Parking \$6 Day 2 Parking \$6

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

PDF \$429 (\$409 thru 10/2) Hard-copy \$459 (\$439 thru 10/2)

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Ethics & Professionalism only \$90 (hard-copy materials only)

Ethics only \$45 (hard-copy materials only)

Professionalism only \$45 (hard-copy materials only)

NOTE:

- Walk-in registrations must pay the registration price for and receive hard-copy materials by default.
- Instructions on how to download PDF materials will be included in your confirmation letter. 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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*Due to LSU parking policy changes, there is no longer a free, reserved lot. For more information, visit www.lsucle.org/directions



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