

LSU cle

45th Annual

Estate Planning Seminar

October 8-9, 2015

LSU Law Center

McKernan Law Auditorium
Baton Rouge, LA

- Successions & Donations
 - Drafting Special Needs Trusts (with forms)
 - Attorney-Client Privilege for Trustees, Succession Representatives, and Decedents
 - Drafting Trusts to Receive Retirement Benefits (with forms)
 - Recent Developments in Taxation of Interest to Estate Planners
 - Conflict of Laws
 - Planning with Social Security and Medicare Benefits
 - Anatomy of a Trust
 - The New Louisiana Business Corporation Act
 - Twilight Years Issues
 - Ethics
 - Professionalism
- 12.5 CLE credits (FULL YEAR) including Ethics & Professionalism
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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LSU Law Bldg, Room W203
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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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Professor Elizabeth R. Carter

LSU Law Center, Baton Rouge

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

GENERAL INFORMATION

Full Set of 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 1, 2015, 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.

2015 PROGRAMS

Recent Developments in Legislation & Jurisprudence

September 11-12, 2015, LSU Law Center

Recent Developments in Legislation & Jurisprudence

September 17-18, 2015, Shreveport Convention Center

19th Annual Family Law Seminar

September 24-26 2015, Embassy Suites Hotel, Baton Rouge

Recent Developments in Legislation & Jurisprudence

October 1-2, 2015, Cajundome Convention Center, Lafayette

Recent Developments in Legislation & Jurisprudence

October 29-30, 2015, L'Auberge du Lac Resort, Lake Charles

Insurance Law Seminar

October 30, 2015, LSU Law Center

21st Annual Bankruptcy Law Seminar

November 5-6, 2015, LSU Law Center

Recent Developments in Legislation & Jurisprudence

November 12-13, 2015, Monroe Convention Center

Recent Developments in Legislation & Jurisprudence

November 20-21, 2015, LSU Law Center

Recent Developments in Legislation & Jurisprudence

December 3-4, 2015, Kenner Pontchartrain Center

Recent Developments in Legislation & Jurisprudence

December 11-12, 2015, New Orleans Marriott at the Convention Center

CLE by the Hour

December 16-18, 2015, LSU Law Center

45th Annual

Estate Planning Seminar

McKernan Law Auditorium, LSU Law Center

Thursday, October 8, 2015

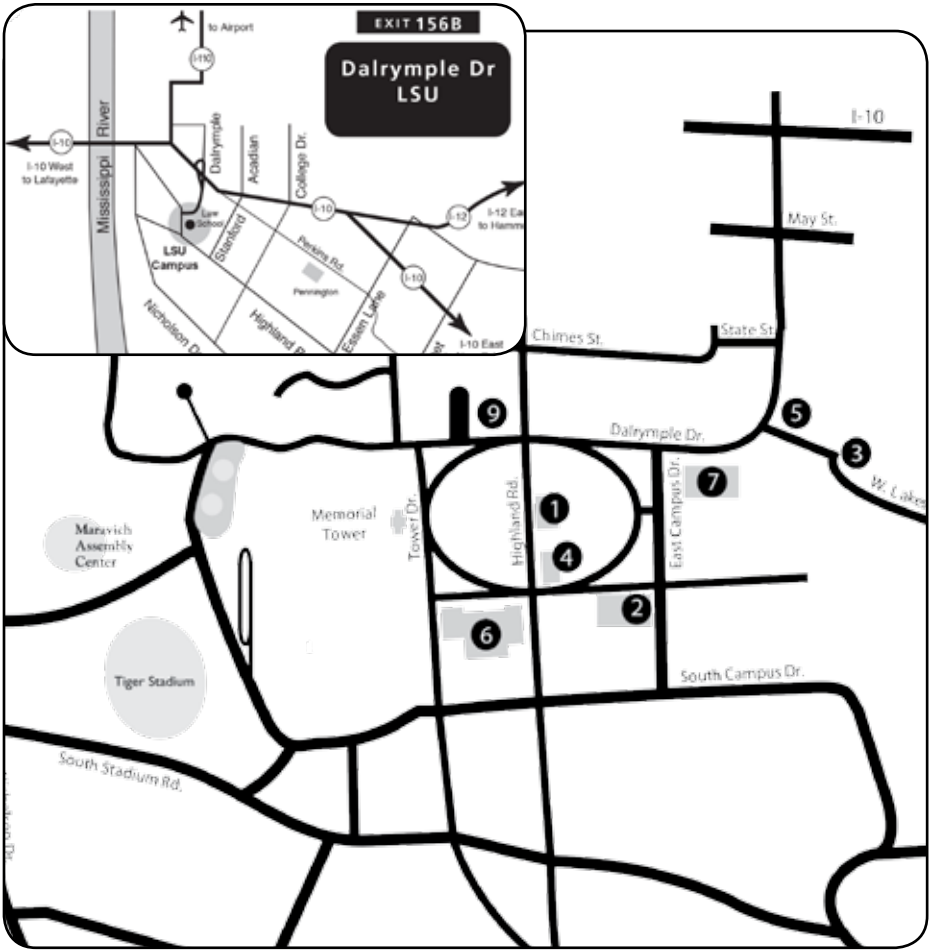
7:30-8:45 am	Registration
7:30-10:00 am	Continental Breakfast (provided)
8:40-8:45 am	Welcome John C. Blackman, IV (Program Chair) Jones Walker LLP, Baton Rouge, LA
8:45-10:00 am (1.25 credit hrs.)	Successions & Donations Update* Joseph W. Mengis Perry, Atkinson, Balhoff, Mengis, Burns & Ellis, L.L.C., Baton Rouge
10:00-10:10 am	Break
10:10-11:10 am (1.0 credit hr.)	Drafting Special Needs Trusts (with forms) Sheila L. Moragas Milling Benson Woodward, LLP, New Orleans
11:10-11:20 am	Break
11:20 am-12:20 pm (1.0 credit hr.)	Attorney-Client Privilege for Trustees, Succession Representatives, and Decedents: Who is the client? Drafting engagement letters. The rules of evidence/how to protect the attorney-client privilege. Laura Walker Plunkett and John Mark Fezio Stone Pigman Walther Wittmann, LLC, New Orleans
12:20-1:30 pm	Lunch (provided) at the LSU Faculty Club
1:30-2:30 pm (1.0 credit hr.)	Drafting Trusts to Receive Retirement Benefits (with forms) Rebecca S. Luster Blanchard, Walker, O'Quin & Roberts, Shreveport
2:30-2:40 pm	Break
2:40-3:40 pm (1.0 credit hr.)	Professionalism* Joseph E. "Buddy" Stockwell, III Lawyers Assistance Program, Inc., New Orleans
3:40-3:50 pm	Break
3:50-5:05 pm (1.25 credit hrs.)	Recent Developments in Taxation of Interest to Estate Planners Rebecca M. Hinton Phelps Dunbar LLP, Baton Rouge

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

Friday, October 9, 2015

7:30-8:45 am	Registration
7:30-10:00 am	Continental Breakfast (provided)
8:45-9:45 am (1.0 credit hr.)	Conflict of Laws Justin T. Mannino Gold, Weems, Bruser, Sues & Rundell, APLC, Alexandria
9:45-9:55 am	Break
9:55-10:55 am (1.0 credit hr.)	Planning with Social Security and Medicare Benefits Carrie H. Paillet Gesund and Paillet, LLC, Metairie
10:55-11:05 am	Break
11:05 am-12:05 pm (1.0 credit hr.)	Legal Ethics* Greg Smith Associate Dean for Business and Financial Affairs Professional Ethics Professor of Law G. Frank and Winston Purvis Professor of Law LSU Law Center
12:05-1:15 pm	Lunch (provided) at the LSU Faculty Club
1:15-2:15 pm (1.0 credit hr.)	Anatomy of a Trust Megan M. Curran Jones Walker LLP, New Orleans
2:15-2:30 pm	Break
2:30-3:30 pm (1.0 credit hr.)	The New Louisiana Business Corporation Act* Professor Emeritus Glenn G. Morris LSU Law Center
3:30-3:40 pm	Break
3:40-4:40 pm (1.0 credit hr.)	Twilight Years Issues Elizabeth R. Carter Judge Anthony J. Graphia and Jo Ann Graphia Associate Professor of Law LSU Law Center

*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

The LSU Law Center does not govern parking on or near its campus and no longer receives guest discounts for parking spaces. *LSU Parking and Transportation Services* is now solely responsible for managing event parking on campus, including payment collection. Therefore, LSU CLE can no longer accept pre-payment for reserved parking spots for its seminar attendees. *LSU Parking and Transportation Services* parking policies and procedures can be found at www.lsucler.org/ep.

We recommend parking in the Law Center lots (law classes are not in session on Oct. 8-9) or the Union Square Parking Garage. Both options require payment upon arrival. Please visit www.lsucler.org/ep for instructions. We recommend you arrive 15-30 minutes early.

Map Legend

- LSU Law Center..... 1**
- Union Square Parking Garage..... 2**
- X60 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

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

PDF \$429 (\$409 thru 10/1) Hard-copy \$459 (\$439 thru 10/1)

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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)

*LSU Parking Policy has changed, visit www.lsucler.org/ep

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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