

LSU
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46th Annual

Estate Planning Seminar

October 27-28, 2016

LSU Law Center

McKernan Law Auditorium
Baton Rouge, LA

- Successions & Donations
- Estate and Tax Planning with Revocable Living Trusts
- Pre and Post Mortem Tax and Estate Planning
- Fixing Broken Trusts, with Tax Considerations
- Recent Developments in Taxation of Interest to Estate Planners
- S Corporations and Estate Planning
- The Trustee Selection Minefield – Tax
- Traps and Other Trustee Selection Considerations
- Appraisals for Tax Purposes
- Assigning Tax Basis and Value to Digital Assets
- The Basis for Determining Basis: Selected Income Tax Issues in Estate Planning
- Ethics
- Professionalism

12.5 CLE credits (FULL YEAR) including Ethics & Professionalism
Approved for 12.5 hours of Estate Planning and Administration specialization credit
Approved for 12.5 hours of Tax Law specialization credit
3.0 Title Insurance CE credits
Approved for Texas CLE credits



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1101 LSU Union Square
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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

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 20, 2016, 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.lsucle.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.

2016 PROGRAMS

Recent Developments in Legislation & Jurisprudence

September 2-3, 2016, Embassy Suites Hotel, Baton Rouge

20th Annual Family Law Seminar

September 8-10, 2016, Renaissance Baton Rouge Hotel

Recent Developments in Legislation & Jurisprudence

September 15-16, 2016, Shreveport Convention Center

Construction Law Seminar

September 30, 2016, Renaissance Baton Rouge Hotel

22nd Annual Bankruptcy Law Seminar

October 6-7, 2016, LSU Law Center, Baton Rouge

Recent Developments in Legislation & Jurisprudence

October 13-14, 2016, Cajundome Convention Center, Lafayette

Recent Developments in Legislation & Jurisprudence

October 20-21, 2016, Lake Charles location TBA

Recent Developments in Legislation & Jurisprudence

November 3-4, 2016, Baton Rouge location TBA

Recent Developments in Legislation & Jurisprudence

November 17-18, 2016, Monroe Convention Center

Recent Developments in Legislation & Jurisprudence

December 1-2, 2016, Kenner Pontchartrain Center

Recent Developments in Legislation & Jurisprudence

December 9-10, 2016, New Orleans location TBA

CLE by the Hour

December 13-15, 2016, LSU Law Center

46th Annual Estate Planning Seminar

McKernan Law Auditorium, LSU Law Center

Thursday, October 27, 2015

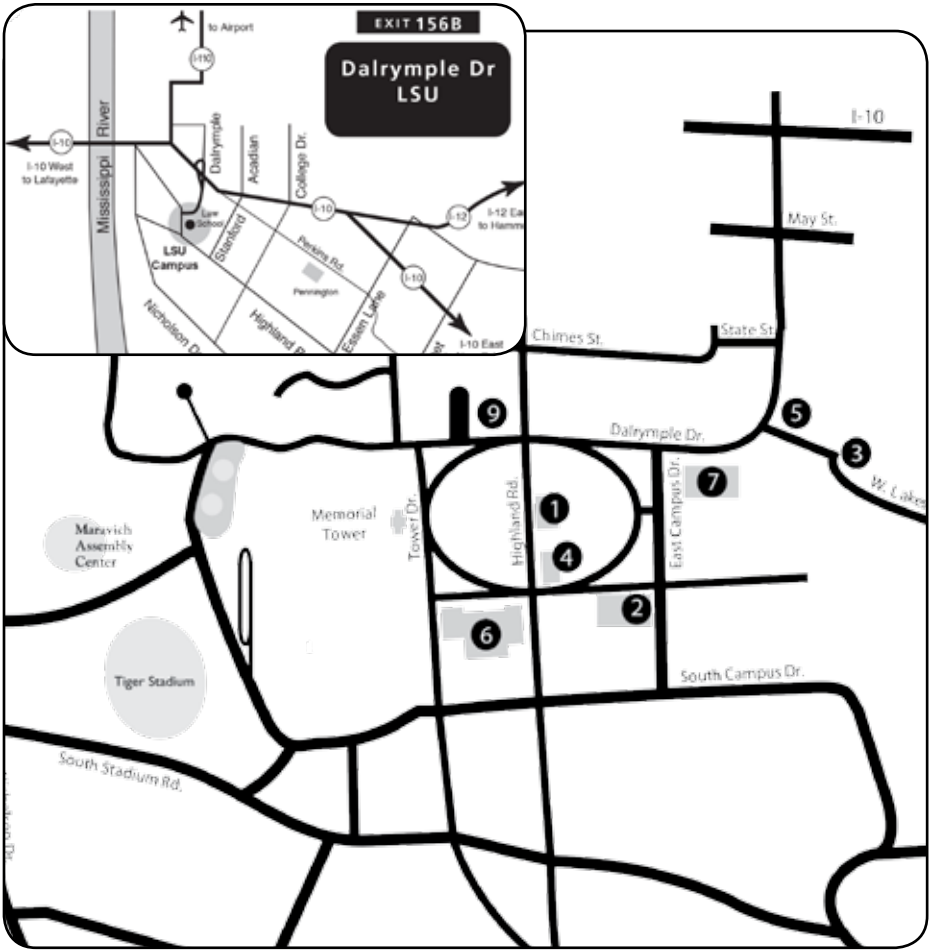
7:30-8:45 am	Registration
7:30-10:15 am	Continental Breakfast (provided)
8:40-8:45 am	Welcome John C. Blackman, IV (Program Chair) Jones Walker LLP, Baton Rouge
8:45-10:00 am (1.25 credit hrs.)	Recent Developments in Successions & Donations* Joseph W. Mengis Perry, Balhoff, Mengis & Burns, L.L.C. Baton Rouge
10:00-10:10 am	Break
10:10-11:10 am (1.0 credit hr.)	Estate and Tax Planning with Revocable Living Trusts Mark S. Stein Lowe, Stein, Hoffman, Allweiss & Hauver, L.L.P. New Orleans
11:10-11:20 am	Break
11:20 am-12:20 pm (1.0 credit hr.)	Pre and Post Mortem Tax and Estate Planning John B. Landry, Jr. McNew, King, Mills, Burch & Landry, LLP Monroe
12:20-1:30 pm	Lunch (provided) at the LSU Faculty Club
1:30-2:30 pm (1.0 credit hr.)	Fixing Broken Trusts, with Tax Considerations Kyle C. McClinnis Kean Miller, LLP Shreveport
2:30-2:40 pm	Break
2:40-3:40 pm (1.0 credit hr.)	Professionalism* D. Bruce Spizer Attorney at Law 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 28, 2016

7:30-8:45 am	Registration
7:30-10:00 am	Continental Breakfast (provided)
8:45-9:45 am (1.0 credit hr.)	S Corporations and Estate Planning Jonathan R. Katz Jones Walker LLP New Orleans
9:45-9:55 am	Break
9:55-10:55 am (1.0 credit hr.)	The Trustee Selection Minefield – Tax Traps and Other Trustee Selection Considerations Mark R. Parthemer Bessemer Trust Palm Beach, FL
10:55-11:05 am	Break
11:05 am-12:05 pm (1.0 credit hr.)	Appraisals for Tax Purposes Curtis R. Kimball Willamette Management Associates Atlanta, GA
12:05-1:15 pm	Lunch (provided) at the LSU Faculty Club
1:15-2:15 pm (1.0 credit hr.)	Legal Ethics* Damon S. Manning Schiff, Scheckman & White, LLP, Hammond
2:15-2:25 pm	Break
2:25-3:25 pm (1.0 credit hr.)	Assigning Tax Basis and Value to Digital Assets Elizabeth R. Carter Judge Anthony J. Graphia and Jo Ann Graphia Professor of Law LSU Law Center
3:25-3:35 pm	Break
3:35-4:35 pm (1.0 credit hr.)	The Basis for Determining Basis: Selected Income Tax Issues in Estate Planning Jeffrey W. Koonce Bernhard Capital Partners 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

The LSU Law Center does not govern parking on or near its campus. Parking policy for all LSU campus parking lots is handled by *LSU Parking and Transportation Services*. There are no free, weekday lots on campus, and the LSU Law Center is no longer afforded any discounted parking for its guests. For more information, visit www.lsucler.org/ep.

Parking is available in the Union Square Parking Garage or X60 Lot. Both options require payment. 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 SELECT A REGISTRATION OPTION BELOW

\$12/day for Union Sq. Parking Garage next to Law Center

☐ Day 1 Parking **\$12** ☐ Day 2 Parking **\$12**

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

☐ PDF **\$429** (\$409 thru 10/20) ☐ Hard-copy **\$459** (\$439 thru 10/20)

Day 1 only (6.5 CLE hrs.) Select your materials preference

☐ PDF **\$309** (\$289 thru 10/20) ☐ Hard-copy **\$339** (\$319 thru 10/20)

Day 2 only (6.0 CLE hrs.) Select your materials preference

☐ PDF **\$309** (\$289 thru 10/20) ☐ Hard-copy **\$339** (\$319 thru 10/20)

☐ 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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