

October 4-5, 2018

LSU Law Center
McKernan Law Auditorium
Baton Rouge, LA

48th Annual

Estate Planning Seminar

- Successions & Donations
- Trusts 101
- Selected Highlights of the 2017 Tax Act
- Case Studies on Tax, Estate, and Family Business Planning under the 2017 Tax Act
- Recent Developments in Taxation of Interest to Estate Planners
- Tax Advocacy
- Filiation
- Fiduciary Litigation
- Usufructuary Accounting and QTIP
- Elder Law and Special Needs Planning
- Ethics
- Professionalism

12.5 hrs. CLE - LA, TX, MS

12.5 Tax Law Specialization/Estate Planning & Administration Specialization Credits
Up to 3.0 Title Insurance CE Credits

LSU | CLE

Center of Continuing Professional Development/LSU CLE
LSU Law Bldg., Room W203
Baton Rouge, LA 70803

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
Bessemer Trust, Houston, TX
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Lake Charles

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.

Walk-in registrations must pay the registration price for and receive hard-copy 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 one calendar week of the opening date of the seminar.

Cancellation Policy

Cancellation requests must be received in our office in writing, by email, fax or mail, no later than 4:30 pm on September 27, 2018 to receive a refund less a \$50 cancellation fee. Requests must be addressed to our office: LSU CLE, LSU Law Bldg., Room W203, Baton Rouge, LA 70803, and may be faxed to (225) 578-5842 or e-mailed to lsucle@lsu.edu.

Additional Information

- Publications: Can't attend? Course Materials may be purchased for shipment after the seminar. Visit www.LSU.CLE.org/materials for information on how to order.
- Special Needs: Call us at (225) 578-5837 with your requests.
- Recording: Video and audio recording are prohibited.

2018 FALL PROGRAMS

Recent Developments in Legislation & Jurisprudence – Baton Rouge 1
September 13-14, 2018, Baton Rouge Marriott Hotel

Recent Developments in Legislation & Jurisprudence – Shreveport
September 20-21, 2018, Shreveport Convention Center

22nd Annual Family Law Seminar
September 27-29, 2018, Renaissance Baton Rouge Hotel

48th Annual Estate Planning Seminar
October 4-5, 2018, LSU Law Center

Recent Developments in Legislation & Jurisprudence – Lafayette
October 18-19, 2018, Lafayette Cajundome Convention Center

Recent Developments in Legislation & Jurisprudence – Monroe
October 25-26, 2018, Monroe Convention Center

Recent Developments in Legislation & Jurisprudence – Lake Charles
November 1-2, 2018, Golden Nugget, Lake Charles

24th Annual Bankruptcy Law Seminar
November 8-9, 2018, LSU Law Center

Recent Developments in Legislation & Jurisprudence – Baton Rouge 2
November 15-16, 2018, Baton Rouge Marriott Hotel

Recent Developments in Legislation & Jurisprudence – Kenner
November 29-30, 2018, Kenner Pontchartrain Center

Recent Developments in Legislation & Jurisprudence – New Orleans
December 6-7, 2018, Sheraton New Orleans Hotel

CLE by the Hour
December 12-13, 2018, LSU Law Center

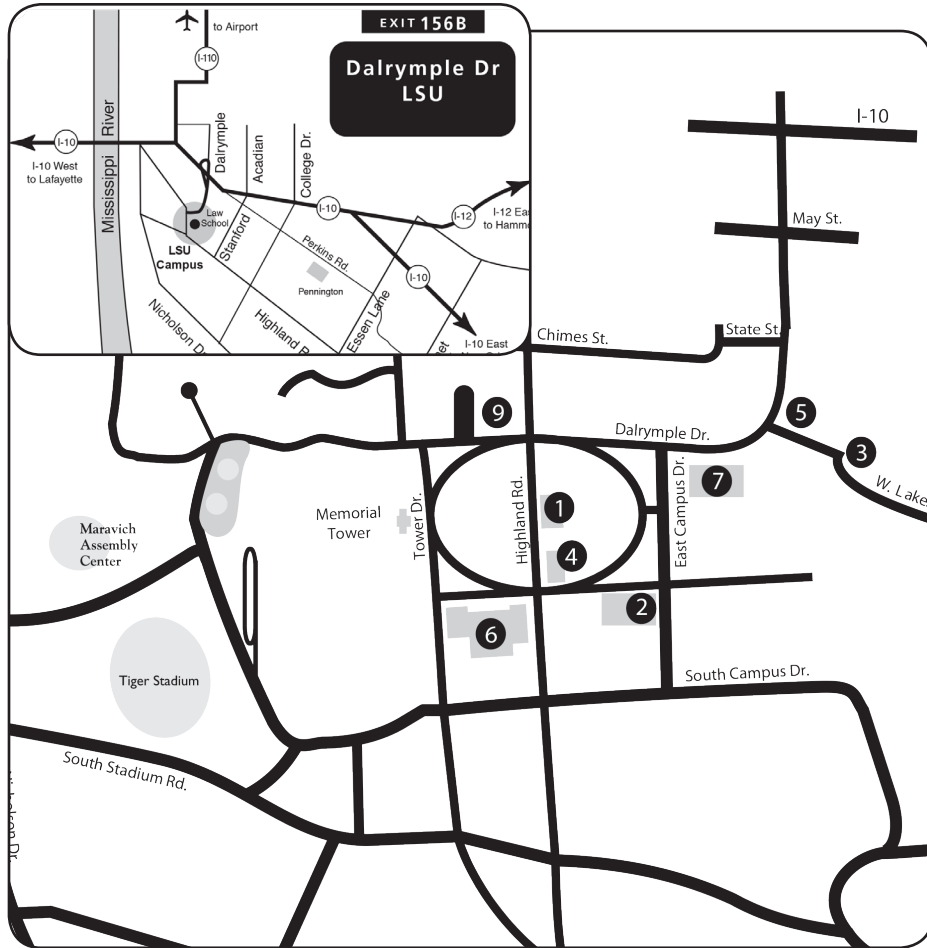
Thursday, October 4, 2018

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.)	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.)	Ethics* Greg Smith Professional Ethics Professor of Law G. Frank and Winston Purvis Professor of Law LSU Law Center
11:10-11:20 am	Break
11:20 am-12:20 pm (1.0 credit hr.)	Trusts 101 Carole Cukell Neff Sessions, Fishman, Nathan & Israel, LLC, New Orleans
12:20-1:30 pm	Lunch (provided)
1:30-2:30 pm (1.0 credit hr.)	Selected Highlights of the 2017 Tax Act (with emphasis on aspects relevant to trusts and estates) John F. McDermott Taylor, Porter, Brooks & Phillips, LLP, Baton Rouge
2:30-2:40 pm	Break
2:40-3:40 pm (1.0 credit hr.)	Case Studies on Tax, Estate, and Family Business Planning under the 2017 Tax Act Miriam Wogan Henry Jones Walker LLP, New Orleans B. Trevor Wilson Jones Walker LLP, Baton Rouge
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 Taylor, Porter, Brooks & Phillips, LLP, Baton Rouge

Friday, October 5, 2018

7:30-8:45 am	Registration
7:30-10:00 am	Continental Breakfast (provided)
8:45-9:45 am (1.0 credit hr.)	Tax Advocacy Current Enforcement Priorities of the IRS and DOJ Offers in Compromise Innocent Spouse Relief Taxpayer Advocate Implications to the Bankrupt Taxpayer David S. Gunn Gunn & York, LLP, Baton Rouge
9:45-9:55 am	Break
9:55-10:55 am (1.0 credit hr.)	Professionalism* Harry J. "Skip" Phillips Taylor, Porter, Brooks & Phillips, LLP, Baton Rouge
10:55-11:05 am	Break
11:05 am-12:05 pm (1.0 credit hr.)	Filiation Andrea B. Carroll Associate Dean for Student and Academic Affairs Donna W. Lee Professor of Family Law LSU Law Center
12:05-1:15 pm	Lunch (provided)
1:15-2:15 pm (1.0 credit hr.)	Fiduciary Litigation Elizabeth R. Carter A.N. Yiannopoulos Professor of Law Judge Anthony J. Graphia and Jo Ann Graphia Professor of Law LSU Law Center
2:15-2:25 pm	Break
2:25-3:25 pm (1.0 credit hr.)	Usufructuary Accounting and QTIP Carla H. Sibille Lukinovich, APLC, Metairie
3:25-3:35 pm	Break
3:35-4:35 pm (1.0 credit hr.)	Elder Law and Special Needs Planning Steven M. Jankower Jankower Law Firm, LLC, Lafayette

*Also approved for 1 credit hour of Title Insurance CE by the Louisiana Dept. of Insurance. NOTE: Course numbers for Ethics, Professionalism, and Successions & Donations correspond with the courses presented at LSU's 2018 Recent Developments seminars. If you attend both seminars, duplicate Title Insurance CE credits are not allowed.



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

LSUcle has reserved the LSU Law Center student lots (accessible from East Campus Drive) for seminar parking. The law school is not in session on Oct. 4 and Oct. 5. A \$5 daily parking fee charged by the LSU Parking Dept. is included in your registration fee. The law lots are the only parking areas reserved for attendee parking. The garage will not be available.

If you wish to park elsewhere, you must find your own spot and are responsible for any payment required.

Map Legend

LSU Law Center and Student Lots.....	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

Note that LSUcle now accepts online registrations only, BUT you may still pay by either check or credit card.

From the Live Seminars page found at www.lsucler.org, click on the seminar you are interested in to see more information about that seminar. There, you will also find a button to register online. Even if you've never used our online registration page, if you've ever attended a seminar with us, you already have an account. Log in using the email you've provided us in the past. If you need or forgot your password, you can use the "Forgot Password" link found on the login page. You will be emailed instructions on how to proceed.

Pricing

Full seminar with PDF materials \$439 (\$419 by Sept. 27)
 Full seminar with hard copy materials \$469 (\$449 by Sept. 27)

Thursday only with PDF materials \$314 (\$294 by Sept. 27)
 Thursday only with hard copy materials \$344 (\$324 by Sept. 27)

Friday only with PDF materials \$314 (\$294 by Sept. 27)
 Friday only with hard copy materials \$344 (\$324 by Sept. 27)

Ethics and Professionalism only \$45 each

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