



THE CENTER FOR AMERICAN
AND INTERNATIONAL LAW



50th Annual Program on Estate Planning



50th Annual Program on Estate Planning

May 28-30, 2014

The Center for American
and International Law
Plano, Texas

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Register before May 14 to receive a discount!

Featured Presenters

- | **Professor Stanley M. Johanson**, James A. Elkins Centennial Chair in Law, University Distinguished Teaching Professor, The University of Texas School of Law, Austin, Texas
- | **Darin N. Digby**, Schoenbaum, Curphy & Scanlan, P.C., San Antonio, Texas
- | **Stephen R. Akers**, Bessemer Trust Company, Dallas, Texas

MCLE Credit

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50th Annual Program on Estate Planning

SCHEDULE

May 28-30

Program Co-Chairs

Santo Bisignano, Jr.

Bisignano Harrison Neuhoﬀ LLP, Dallas, Texas

Michael V. Bourland

Bourland, Wall & Wenzel, P.C., Fort Worth, Texas

WEDNESDAY, MAY 28

8:30	REGISTRATION AND CONTINENTAL BREAKFAST
9:00	BASIC PRINCIPLES AND STRATEGIES IN ESTATE PLANNING — Professor Stanley M. Johanson , James A. Elkins Centennial Chair in Law, University Distinguished Teaching Professor, The University of Texas School of Law, Austin, Texas
10:15	BREAK
10:30	A VISIT TO STANLEY'S ESTATE PLANNING TOOLBOX (Time includes a 15 minute break) — Professor Johanson
12:15	LUNCH PROVIDED
1:15	QUALIFIED PLAN BENEFITS AND IRA'S IN ESTATE PLANNING — Professor Johanson
2:45	BREAK
3:00	LIFE INSURANCE PLANNING (WITH AN EMPHASIS ON IRREVOCABLE LIFE INSURANCE TRUSTS WITH "CRUMMEY" WITHDRAWAL RIGHT PROVISIONS) — Santo Bisignano, Jr. , Bisignano Harrison Neuhoﬀ LLP, Dallas, Texas
5:00	RECESS & HOSTED NETWORKING RECEPTION

Sponsored by



THURSDAY, MAY 29

9:00	ESTATE PLANNING ETHICS — Michael V. Bourland , Bourland, Wall & Wenzel, P.C., Fort Worth, Texas — Darin N. Digby , Schoenbaum, Curphy & Scanlan, P.C., San Antonio, Texas
10:00	BREAK
10:15	MARITAL DEDUCTION PLANNING — Mr. Bisignano
12:15	LUNCH PROVIDED
1:00	PLANNING FOR THE FAMILY BUSINESS, INCLUDING FAMILY LIMITED PARTNERSHIPS (FLPS); WORKING WITH A CLIENT CLOSING A BUSINESS ENTITY — Mr. Bourland
2:00	BREAK
2:15	TRANSFER PLANNING (Time includes a 15 minute break) — Mr. Digby
5:00	RECESS

FRIDAY, MAY 30

9:00	HOT TOPICS IN ESTATE PLANNING (Time includes a 15 minute break) — Stephen R. Akers , Bessemer Trust Company, Dallas, Texas
12:00	LUNCH PROVIDED
12:30	GENERATION-SKIPPING TRANSFER TAX — Mr. Digby
2:30	BREAK
2:45	GENERATION-SKIPPING, CONT.
3:30	POST-MORTEM PLANNING — Mr. Digby
4:30	ADJOURN

*See a description of each session on our website: cailaw.org

What a 2013 Participant Had to Say

*"Very easy-to-understand lectures & building block style of program.
I got what I came for – good explanations of tax basics"*

REGISTRATION

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May 28-30, 2014

The Center for American and International Law
Plano, Texas

Registration includes the Conference, course materials, three continental breakfasts and lunches, and a reception.

Check applicable box:	Received by 5/14/14	Received after 5/14/14
Regular registration fee	<input type="checkbox"/> \$1175	<input type="checkbox"/> \$1225
CAIL Member or Member Employee	<input type="checkbox"/> \$1025	<input type="checkbox"/> \$1075
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U.S. Law Student (J.D.)	<input type="checkbox"/> \$275	<input type="checkbox"/> \$325
Materials Only	<input type="checkbox"/> \$625	<input type="checkbox"/> \$675

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The Center for American
and International Law
5201 Democracy Drive
Plano, TX USA 75024

PHONE
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972.244.3400 or 800.409.1090
8:30am-5:00pm CST

PAYMENT MUST ACCOMPANY REGISTRATION

GENERAL INFORMATION

WHO SHOULD ATTEND: This program is for new and experienced lawyers (and other professionals) who want to include Estate Planning in their practices or who want a comprehensive overview.

CLASS SCHEDULE: A light continental breakfast and lunch will be served each day. At the conclusion of class on Wednesday, there will be a reception at CAIL.

CANCELLATION POLICY: Tuition, less a \$50 cancellation fee, will be refunded upon receipt of written cancellation received by May 14, 2014. E-mail cancellation notice to cburkel@cailaw.org. After this date, no refunds, but substitution of attendees for this program will be permitted. Registrants not entitled to a refund will receive the course materials.

HOUSING: The cost of housing is not included in tuition. However, rooms (in limited number) have been reserved at the Hyatt Place Plano, 3100 Dallas Pkwy, Plano, Texas 75093. Registrants should call 888.HYATT.HP (888-492-8847) or 972.378.3997 and advise them they are attending "CAILAW Estate Planning" to receive a reduced room rate of \$90 + tax. The last day to obtain this special rate is May 13, 2014.

NONDISCRIMINATION POLICY: The Center for American and International Law does not discriminate on the basis of race, color, sex, religion, national origin, age, disability, veteran status or any other protected status in educational activities, scholarship programs or admissions.

MCLE CREDIT: This program is approved by the State Bar of Texas for 19.25 hours, including 1 hour of ethics. Course ID Number: 901284912. Sign-in sheets and/or certificates of attendance will be available for ALL states.

SPECIALIZATION CREDIT: This program is approved by the Texas Board of Legal Specialization for 19.25 hours in the following areas: Estate Planning and Probate Law and Tax Law

CPA CREDIT: CPA's will receive 23 hours of CPE credit, no ethics. Fill out the green sheet asking for CPE credit.



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AND INTERNATIONAL LAW**

50TH ANNUAL PROGRAM ON ESTATE PLANNING

The Center for American and International Law
5201 Democracy Drive
Plano, TX USA 75024

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