



THE CENTER FOR AMERICAN
AND INTERNATIONAL LAW



Short Course on Estate Planning

51st Annual Program



51st Annual Program Short Course on Estate Planning

February 4 - 6, 2015

The Center for American
and International Law
Plano, Texas

Register Now! cailaw.org

Register before January 21 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
- | **Alvin J. Golden**, Ikard Golden Jones, P.C., Austin, Texas

MCLE credit will be available.

51st Annual Program: Short Course on Estate Planning

SCHEDULE

February 4 - 6

Program Co-Chairs

Santo Bisignano, Jr.

Bisignano Harrison Neuhoﬀ LLP, Dallas, Texas

Michael V. Bourland

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

WEDNESDAY, FEBRUARY 4

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 AND IRREVOCABLE
LIFE INSURANCE TRUSTS

— **Santo Bisignano, Jr.**, Bisignano Harrison
Neuhoﬀ LLP, Dallas, Texas

5:00 RECESS & HOSTED NETWORKING
RECEPTION

THURSDAY, FEBRUARY 5

8:30 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

9:30 BREAK

9:45 MARITAL DEDUCTION PLANNING & PORTABILITY

— **Alvin J. Golden**, Ikard Golden Jones, P.C.,
Austin, Texas

11:45 LUNCH PROVIDED

12:00 LUNCH PRESENTATION: PRIMER ON
CHARITABLE PLANNING

— **Mr. Bourland**

1:00 BREAK

1:15 PLANNING FOR THE FAMILY BUSINESS,
INCLUDING FAMILY LIMITED PARTNERSHIPS
(FLPS); WORKING WITH A CLIENT CLOSING A
BUSINESS ENTITY

— **Mr. Bourland**

2:15 BREAK

2:30 TRANSFER PLANNING (Time includes a 15 minute
break)

— **Mr. Digby**

5:00 RECESS

FRIDAY, FEBRUARY 6

8:30 HOT TOPICS IN ESTATE PLANNING (Time includes
a 15 minute break)

— **Stephen R. Akers**, Bessemer Trust
Company, Dallas, Texas

11:30 LUNCH PROVIDED

12:00 GIFTING TECHNIQUES AND AN OVERVIEW OF
THE GENERATION-SKIPPING TRANSFER TAX

— **Mr. Digby**

2:00 BREAK

2:45 GENERATION-SKIPPING, CONT.

3:00 POST-MORTEM PLANNING

— **Mr. Digby**

4:00 ADJOURN

Sponsored by



*See a description of each session on our website: www.cailaw.org under "Events Calendar"

What 2014 Participants Had to Say

"The speakers were very knowledgeable and engaging."

"Really good introduction to the practice area."

REGISTRATION

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

Multiple Registrants from the same organization: Please contact Vickie for special pricing for tuition levels exceeding \$675 - vadams@cailaw.org or 972.244.3408.

Check applicable box:	Received by 1/21/15	Received after 1/21/15
Regular registration fee	<input type="checkbox"/> \$1175	<input type="checkbox"/> \$1225
CAIL Member or Member Employee	<input type="checkbox"/> \$1025	<input type="checkbox"/> \$1075
Government / Non-Profit / Academic Employee	<input type="checkbox"/> \$1075	<input type="checkbox"/> \$1125
U.S. Law Student (J.D.)	<input type="checkbox"/> \$275	<input type="checkbox"/> \$325
Attorneys, CFPs, CPAs and Trust Officers Licensed/Employed 3 Years or Less	<input type="checkbox"/> \$587.50	<input type="checkbox"/> \$637.50
Materials Only	<input type="checkbox"/> \$625	<input type="checkbox"/> \$675

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4 WAYS TO REGISTER

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www.cailaw.org

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check or credit card
The Center for American
and International Law
5201 Democracy Drive
Plano, TX USA 75024

PHONE

credit card only
972.244.3404 or 800.409.1090
8:30am-5:00pm CT

PAYMENT MUST ACCOMPANY REGISTRATION

GENERAL INFORMATION

WHO SHOULD ATTEND: This program is designed for the new lawyer, CPA, financial planner and trust officer whose primary career focus requires a thorough knowledge of estate planning. It is also a great program for the experienced lawyer who wants to be re-introduced to the estate planning profession.

CANCELLATION POLICY: Tuition, less a \$50 cancellation fee, will be refunded upon receipt of written cancellation received by January 21, 2015. E-mail cancellation notice to lgaspar@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 use booking code G-CL47 to receive a reduced room rate of \$92 + tax. The last day to obtain this special rate is January 20, 2015.

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 20 hours, including 1 hour of ethics. Course ID Number: 901305030. Credit hours for other states will vary and are subject to each state's approval and credit rounding rules. As registrar, CAIL will directly apply for course accreditation in the following states: CA, MN, NM, OH, OK, PA, TX and VA. Some of these states may not approve a program for credit hours before the program occurs. Attorneys may be eligible to receive CLE credit through reciprocity or attorney self-submission in other states. This program is approved by the Texas State Board of Legal Specialization in the following areas: Estate Planning, Probate Law and Tax Law.

CPA CREDIT: CPAs will receive 24 hours of CPE credit, no ethics. A sign-in sheet will be available at the conference. Certificates will be e-mailed.



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SHORT COURSE ON ESTATE PLANNING**
The Center for American and International Law
5201 Democracy Drive
Plano, TX USA 75024

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