Greetings from the Professor!

For the past 49 years, I have participated in a very special estate planning program. Many of you recall the program by its original name—“Short Course on Estate Planning.” At its inception, the Short Course was sponsored by the Southwestern Legal Foundation. Well, the course is still going on (and so am I!), with SWLF now known as the Center for American and International Law (CAIL or CAILAW). Oh, by the way, this will be the <u>50th anniversary</u> of my participation.

What makes this program so unique and useful is that it takes a one-of-a-kind comprehensive look at the "basics" of estate planning. I have always believed—and I continue to believe—that it is a "must attend" program for the new lawyer, CPA, financial planner, and trust officer whose primary career focus requires a thorough knowledge of estate planning. Several Texas firms have regularly sent their new associates to the course, to give them a grounding on basic estate planning principles and strategies. The course is also extremely helpful for the experienced lawyer who wants to be re-introduced to the estate planning profession or is changing the focus of his or her practice area to estate planning.

For many years the course went for five days, and I taught most of the course myself. The course now runs for three days, and for the past several years I speak only one day. The rest of the program takes advantage of some household-name CLE speakers: Santo Bisignano, Jr. (Co-Chair), Michael V. Bourland (Co-Chair), Darin N. Digby, Stephen R. Akers, Alvin J. Golden, Melissa Willms, and of course yours truly. Everyone on the program is an ACTEC Fellow, and you would need an expensive calculator to add up the cumulative years of experience.

Here is a sample of the topics that will be covered (instructor in parenthesis):

1. Basic Estate Planning Principles and Strategies (Johanson),
2. Marital Deduction Planning and Portability (Golden),
3. Income Taxation of Estates and Trusts (Willms),
4. Life Insurance Planning and Irrevocable Life Insurance Trusts (Bisignano),
5. Gifting Techniques and An Overview of the Generation-Skipping Transfer Tax (Digby),
6. Tax Planning with Qualified Benefits (Johanson),
7. A Primer on Charitable Planning (Bourland),
8. Business Succession Planning (Bourland),
9. Post Mortem Planning (Digby),
10. Hot Topics in Estate Planning (Akers),
11. and More.

More than a few participants in past programs have said, in their post-course critiques, that this is one of the finest CLE programs in the country. And you know what? Their critiques have been right on the money!

Bottom line: Mark your calendar and join us at CAIL’s headquarters in Plano, Texas on February 3-5, 2016 for CAIL’s Short Course on Estate Planning.

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