# REGISTRATION

☐ **Fee: $295** **2010 Estate Planning Symposium**
(includes free registration in the 2010 Advising Entrepreneurs in Business Succession Planning,)

☐ **I will also attend the 2010 Advising Entrepreneurs in Business Succession Planning** (at no additional charge) (You must check this box to receive the lunch and materials)

Enclosed is $ ________ for _______ registration(s) at $295 each for enrollment in the Kansas City Estate Planning Symposium at the Overland Park Convention Center, 6000 College Blvd., Overland Park Kansas 66211 on Thursday, April 29 and Friday, April 30, 2010. (Single day registrations are not available.) The registration includes free enrollment in the "Advising Entrepreneurs in Business Successino Planning" seminar on Friday afternoon.

☐ **2010 Advising Entrepreneurs in Business Succession Planning**
(without the Estate Planning Symposium):

Enclosed is $ ________ for _______ registration(s) at $95 each for enrollment in the Kansas City Estate Planning Symposium 2010 Advising Entrepreneurs in Business Succession Planning at the Overland Park Convention Center, 6000 College Blvd., Overland Park, Kansas 66211 on Friday, April 30, 2010. This registration does not include enrollment in the Kansas City Estate Planning Symposium and is for the Friday afternoon program only.

☐ I cannot attend the seminar but would like _____ flash drive copy(ies) of the course material for $100 each.
Enclosed is $ _____ for _____copy(ies).

**Register online at www.kceps.org**

**Identification** (Please check all that apply):

_____ Attorney _____ CFP _____ Consultant
_____ CPA _____ Trust Officer _____ Nonprofit
_____ University or College Professor _____ Financial Service Professional

Other (please specify) ____________________

**Registration Information:**

Attendee Name (please print) ____________________

Firm ____________________

Address____________________

City, State, ZIP ____________________

Firm or Company Phone ____________________

E-mail ____________________

FAX ____________________

Provide E-mail and FAX numbers only if you wish to receive E-mail or FAX notification of future seminars.

**Credit Card Payment:**
If paying by credit card, complete the following information. Credit card registrations may be sent by fax to (816) 235-5414.

Cardholder's Name (as it appears on the card) ____________________

Card Number ____________________

Expiration Date ____________________

No admission ticket or confirmation will be sent. Please pick up materials at the registration desk on the day of the program. Pre-registration is encouraged. There is no penalty for walk-in enrollments.

**Check Payment:** Make checks payable to Kansas City Estate Planning Symposium and mail along with this form to: Continuing Legal Education, UMKC School of Law, 5100 Rockhill Road, Kansas City, MO 64110-2499. If you have any questions please consult our web page at www.kceps.org or call (816) 235-1648. Relay Missouri: 1-800-735-2966 (TT) or 1-800-735-2466 (voice).

**KCEPS Cancellation and Refund Policy:** Cancellations and refund policy: Cancellations received by 5 p.m., April 15, 2010 will be refunded. Due to advance commitment requirements, cancellations received after 5 p.m. April 15, 2010 will receive the course materials on CD ROM, but no refund. For more information please contact our office at 816-235-1648.

**BONUS**
**Friday Afternoon**
**Program**
**Business Succession**
**for**
**Entrepreneurs**

29th ANNUAL

KANSAS CITY

# ESTATE PLANNING SYMPOSIUM

In cooperation with the Estate Planning Society of Kansas City, the Financial Planning Association of Greater Kansas City, the University of Missouri-Kansas City Bloch School of Business, and the University of Missouri-Kansas City School of Law

**Thursday-Friday, April 29-30, 2010**
Overland Park Convention Center
6000 College Boulevard
Overland Park, Kansas 66211
www.kceps.org

Symposium Chairperson
J. Joseph Morris • Vold & Morris, L.L.C.
Leawood, Kansas

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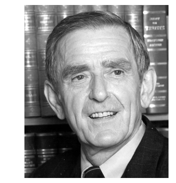
UMKC is an equal opportunity/affirmative action institution.
**www.kceps.org**
**29th Annual Kansas City Estate Planning Symposium, April 29-30**
**Overland Park Convention Center**

# PROGRAM SCHEDULE

## *Thursday, April 29, 2010*

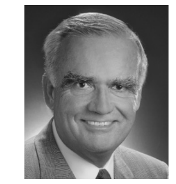
**7:30 AM** **REGISTRATION AND CONTINENTAL BREAKFAST**

**8:00 AM** **RECENT DEVELOPMENTS AFFECTING ESTATE PLANNING**
Professor Johanson will address recent developments in estate planning, including legislative changes, and recent cases, regulations and rulings.



**Professor Stanley M. Johanson** is the Fannie Coplin Regents Chair in Law at the University of Texas School of Law. He is the author of Wills, Trusts and Estates (7th ed.2005), which is used at over 120 law schools.

**9:20 AM** **GETTING THE FAMILY BUSINESS OWNER OFF THE DIME: HOW TO GET THEM STARTED ON ESTATE AND BUSINESS SUCCESSION PLANNING**
This presentation covers a variety of 'hot buttons" which might be used to motivate business owners to confront their mortality and to take steps now to save their businesses from imploding when the entrepreneur dies.



**Eric A. Manterfield**, a partner in Krieg DeVault LLP was named in 2009 Worth magazine as one of the top 100 estate planning attorneys in the US. He authored Critical Elements of Estate Planning With Forms, Fourth Edition (2009)

**10:10 AM** **REFRESHMENT BREAK**

**10:25 AM** **ROTH IRA CONVERSIONS - CRUNCHING THE NUMBERS**
Just how valuable is a retirement plan "stretch-out?" Will it be more valuable after a Roth IRA conversion? What are the rules, risks, and rewards? Why are some calling the year 2010 the "Year of the Roth?"

**Steven E. Trytten** is a partner in Anglin Flewelling Rasmussen Campbell & Trytten, LLP of Pasadena, CA and lectures country-wide on estate planning and taxes. He has been quoted in Forbes, Bloomberg Wealth Manager, and Kiplinger's Retirement Report

**11:15 AM** **POST MORTEM ELECTIONS AND STRATEGIES INCLUDING THE NEW REGULATIONS UNDER IRC §2053**
A myriad of tax elections and strategies are available after death-it's not too late to plan! Selected income and estate tax strategies (including the new regulations under IRC §2053) and disclaimers are addressed.

**Stephen R. Akers** is Managing Director and Associate Fiduciary Counsel, Bessemer Trust Company, N.A. in Dallas Texas. He is board certified in Estate Planning and Probate Law by the Texas Board of Legal Specialization.

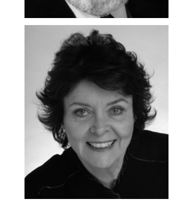
**12:05 PM** **LUNCH BREAK (Provided)**
*SPONSORED BY The Private Client Reserve at US Bank*

**Luncheon Presentation**
**FROM CRUZAN TO SCHIAVO: LESSONS LEARNED**
On the twentieth anniversary of the U.S. Supreme Court's Nancy Cruzan case, what is the law's role in addressing the challenges of advances in medical technology and an aging population?

**William H. Colby** is General Counsel for Truman Medical Centers, is the lawyer who represented the Nancy Cruzan family in the first right-to-die case heard by the U.S. Supreme Court.

**1:35 PM** **CHILDREN, FAMILY WEALTH AND ESTATE PLANNING**
The effect of family wealth on children is examined along with a focus on how to develop estate plans that reflect the client's values.

**Jon J. Gallo** heads the Family Wealth Practice Group of Greenberg Glusker Fields Claman & Machtinger, LLC.



**Eileen Gallo Ph.D.** assists individuals and families with the psychological and emotional issues related to money, children, and family wealth.

# PROGRAM SCHEDULE

**2:35 PM** **USEFUL WEALTH TRANSFER TAX QUIRKS**
This session explores less-than-obvious estate planning quirks that present useful opportunities or landmines that may be useful to avoid.

**Professor Jeffrey N. Pennell** is the Richard H. Clark Professor of Law at Emory University School of Law in Atlanta. He is the successor author of Casner & Pennell on ESTATE PLANNING (6th ed.).

**3:25 PM** **VENDOR REFRESHMENT BREAK** Sponsored by Country Club Trust Company, N.A.

**3:40 PM** **ASSET PROTECTION: BACKGROUND, TOOLS, AND STRUCTURES WITH SPECIAL EMPHASIS ON MISSOURI AND KANSAS**

With the increasing economic turbulence and corresponding emphasis on asset protection, such advice is an increasingly important component of a well constructed estate plan.

**Elizabeth M. Schurig** is a partner in Schurig Jetel Beckett Tackett of Austin, Texas and is an author and frequent speaker in the areas of domestic and international estate planning, asset protection, and foreign trust planning and tax compliance.

**4:30 PM** **ADJOURN and COCKTAIL RECEPTION** Sponsored by Midwest Trust

## *Friday, April 30, 2010*

**7:00 AM** **REGISTRATION AND REFRESHMENTS**

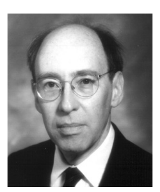
**7:30 AM** **ETHICAL PITFALLS AND HOW TO AVOID BECOMING A PARTY**
**Elizabeth M. Schurig and Eric A. Manterfield**

**8:30 AM** **COVERING YOUR CLIENT'S S (CORPORATION) - WHAT ESTATE PLANNERS SHOULD KNOW ABOUT S CORPORATIONS**

Innovative solutions to some of the most common problems estate planners encounter when their clients use the S corporation form of business.

**Professor Samuel A. Donaldson** is a Professor and Director of the Graduate Program in Taxation at the University of Washington School of Law in Seattle, Washington.

**9:20 AM** **CHARITABLE PLANNING POTPOURRI: TRICKS, TRAPS, HOT TOPICS AND OLD IDEAS REVISITED**



Advanced charitable issues including marital deduction tricks and traps in charitable planning, tax issues in estates with charitable beneficiaries.

**Lawrence P. Katzenstein** is a partner in the Thompson Coburn LLP firm in St. Louis, Missouri and is a nationally known authority on estate planning and planned giving, and a frequent speaker around the country to professional groups.

**10:10 AM** **REFRESHMENT BREAK**

**10:25 AM** **THE TOP TWENTY (OR SO) LIST OF PERSONAL (ESTATE PLANNING) INSURANCE PLANNING MISTAKES - AND HOW TO AVOID (OR AT LEAST FIX) THEM**

**Lawrence Brody** is a partner in the St. Louis, Missouri office of Bryan Cave LLP, an international law firm. He is a member of its Private Client Service Group.

**11:15 AM** **ETHICAL REPRESENTATION OF THE CLIENT WITH DIMINISHED CAPACITY**

Representation of seniors (and clients with disabilities) can pose both ethical and practical concerns.

**Robert Fleming** of the Tucson law firm of Fleming & Curti is a frequent speaker on special needs trusts and elder law issues. He is the author of The Elder Law Answer Book.

# BONUS PROGRAM

## Advising Entrepreneurs in Business Succession Planning

**Friday, April 30, 2010**
**Overland Park Convention Center**
**Included without charge for Symposium registrants or $95 for Friday afternoon progam ONLY**

Cosponsored by the Kansas City Estate Planning Symposium, the Kauffman Foundation, the University of Missouri-Kansas City Institute for Entrepreneurship & Innovation, the University of Missouri-Kansas City Bloch School of Business, the University of Missouri-Kansas City School of Law, and the Financial Planning Association of Greater Kansas City

Continuing Education credit: 3.7 hours Missouri CLE credit / Kansas credit pending
CPA, CFP, insurance credit available

**12:15 PM** **Luncheon Presentation** (lunch included)

**12:45 PM** **ADVISING ENTREPRENEURS OF FAMILY BUSINESSES IN SUCCESSION PLANNING**
Mr. Fishback will address the importance of entrepreneurship in the economy, with special focus on family businesses and on the roles played by professional advisors to entrepreneurs.

**Bo Fishback**, Vice President of Entrepreneurship at the Ewing Marion Kauffman Foundation Kansas City, Missouri

**1:45 PM** **BUSINESS SUCCESSION PLANNING IN MULTI-GENERATIONAL BUSINESSES**
Panel Discussion with Questions and Answers: Topics include succession planning in multi-generational businesses and issues in determining whether to continue or sell a business.

**Co-Moderators: Tony Luppino,** UMKC School of Law and **Joe Singer,** UMKC Bloch School of Business
**Panel of business owners:**
**Terrence P. Dunn,** J.E. Dunn Construction Group, Inc. Kansas City, MO
**Charles Sunderland,** Ash Grove Cement • Kansas City, MO
**Peter K. Lemke,** EFL Associates • Mission Hills, Kansas

**3:00 PM** **REFRESHMENT BREAK**

**3:10 PM** **CASE STUDY IN SUCCESSION PLANNING: SIX CHALLENGES IN FAMILY BUSINESS SUCCESSION AND WHAT ONE FAMILY DID ABOUT THEM**
Five sibilings will speak candidly about how their father's estate plan affected their lives and the succession process. Their goal is for their transparency to leave the audience with new insights about how estate planers can add to, or subtract value from the legacy of a family

**Joe Paul,** MCS Financial Advisors Fee-Only Wealth Management Eugene, Oregon
**Representatives of the Dean Family (of Dean Machinery).**
**Lori Lester Dean • Melanie Dean • Paul Dean • Linda Dean**

**4 PM** **ADJOURN**

**Lodging Information:**
A block of rooms is available at the Sheraton Overland Park, Kansas telephone number 866-837-4214. When making your reservations, please be sure to mention the "Kansas City Estate Planning Symposium" to receive a group rate of $169 standard sngl/dbl. The room block cut off date is April 7, 2010. After that date, rooms are on a space available basis.

**CLE Credit hours:**
Missouri 13.8 hours with 2.0 ethics (April 29 – 8.8 hours and April 30 – 5.0 hours with 2.0 ethics); Kansas: 13.0 hours with 2.0 ethics (April 29 – 8.0 hours and April 30 – 5.0 hours with2.0 ethics) Arkansas: 9.75 includes 1.75 ethics; Iowa: 9.75 includes 1.75 ethics; Oklahoma:pending; Nebraska 10.5 with 1.66 ethics
Missouri L&H Insurance: pending – Kansas Insurance: April 29 - 8.0 L&H Hours –; April 30 – 3.0 L&H hours; April 30 Ethics – 2.0 hours
CFP®: 13.5 hours; CPE Credit: 13.5

**CPA Credit information:**
Sponsor: UMKC/CLE
A. Course level: intermediate, update.
B. Course Objectives: The attendee will learn about new developments and concepts in estate planning and how to best advise entrepreneurs on business succession planning
C. No prerequisites or advance preparation
D. Delivery Method: Group live.
E. Recommended CPE credit to be awarded: 13.5 hours.
F. For more information regarding administrative policies such as complaint and refund, please contact our offices at 816-235-1648.
G. UMKC/CLE is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN, 37219-2417. Web site: www.nasba.org.

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* Denotes past Symposium chairperson

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