



Intermediate Estate Planning 2019

Intermediate Estate Planning offers an in-depth look at two real-world estate-planning topics encountered by every estate planner. It provides an essential bridge between the more basic “Fundamentals” event and the national-caliber educational experience of the KCEPS Annual Conference: The Kansas City Estate Planning Symposium, held in the spring of each year.

The Intermediate Estate Planning event offers a “can’t miss” program for anyone who wants to be more knowledgeable and engaged in an estate planning practice. Although formatted for lawyers, this program will prove highly valuable for trust officers, CPAs, fundraising executives, and all estate planning professionals.

Friday, February 1, 2019

E. E. “Tom” Thompson Courtroom,
UMKC School of Law • 500 E. 52nd
Street, Kansas City, Missouri 64110

**This LIVE in person event is also
available via webcast.**

**Cost: \$125 includes parking pass
and breakfast.**



Continuing Education Credit: CLE Missouri: 4.0

CLE Kansas: Credit Pending • CPA, CFP and CFRE Credit: Pending

All credit will be the same for webcast and in-person attendees.

*This schedule is subject to change. Course materials will be provided in electronic format only and will be accessible with your laptop, tablet or other mobile device during the event.



**More information and online registration
at KCEPS.org. Visit law.umkc.edu/clevents,
email UMKCCLE@UMKC.EDU or call 816-235-1648**

Co-sponsored by the Kansas City Estate
Planning Symposium and University of
Missouri – Kansas City School of Law

7:30 AM

Registration and Breakfast

8:00 -
9:40 AM

Flexible Trust Planning in Uncertain Times

Scott Blakesley, Spencer Fane, LLP

The continued uncertain status of the tax laws adds an additional challenge to an estate planner whose task is to help a client develop and document an appropriate plan for the future disposition and management of assets. In this session, Scott will discuss the importance of drafting and utilizing trust provisions that take into account the constantly changing tax rules, while still effectively addressing a client's goals, assets and family situation. Furthermore, specially designed trusts and trust provisions can assist a client in making sure their wishes are carried out as to the results they would like to see regarding the impact of the assets they are leaving for their intended beneficiaries. Quality estate planning is much more than just "who gets what when" – but should involve documents that provide structure and guidance as to the way assets should and should not be used in the future in order to provide true benefits for the generations that follow.



Scott Blakesley is a partner and leader of Spencer Fane's Kansas City estate planning group. Scott's practice involves all areas of estate planning and trust and estate administration, including family-owned businesses, planning for multiple generations, charitable gift planning, tax-exempt organizations, estate and gift tax planning, and general advice and counseling for family members involved in business and estate planning. Scott is the 2019 Chair for the

Kansas City Estate Planning Symposium and has been selected The Best Lawyers of America®, Trusts and Estates, from 1995-2019

9:40 AM

Break

10:00 -
11:40 AM

Business Entity Considerations – From Design 'Till Death Do Us Part

Teal Dakan

This session will provide an overview of the tax aspects of common business entities, to help the client select an entity in the planning stage to achieve their current and long-term objectives, including transfers during lifetime or at death. We will also discuss operating and income tax basis aspects of these entities at death, including elections available at the fiduciary and entity levels, potential planning opportunities, valuations and traps for the unwary.



Teal is the North Region leader for BKD's Private Client Services (PCS) tax team. In that capacity, he provides sophisticated income, estate and gift tax compliance, consulting and planning services to privately owned businesses, affluent families, fiduciaries and private foundations. He is also a designated and trained BKDnext® advisor. BKDnext is an intentional process designed to help business owners develop a comprehensive succession and continuity plan

to achieve financial security for their businesses, their families and their futures. Teal is a current member and past president of the Kansas City Estate Planning Society.

11:40 AM

Adjourn

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REGISTRATION FORM

Intermediate Estate Planning 2019

Friday, February 1, 2019
In Person and Webcast

E. E. "Tom" Thompson Courtroom, UMKC School of Law
500 E. 52nd Street, Kansas City, Missouri 64110

Registration 7:30 am | Seminar 8:00 am – 11:40 am | Parking and breakfast included

Ways to pre-register



ONLINE

law.umkc.edu/cleevents



PHONE

816-235-1648



FAX

816-235-6552



MAIL

UMKC CLE, 4825 Troost Ave. Suite 211
Kansas City, MO 64110

Registration

KFG37

Name: _____

Firm: _____

Address: _____ City: _____ State: _____ Zip Code: _____

Office Phone: _____ E-Mail Address: _____

Payment Information

Attendance: In person Webcast

\$125 Registration Fee Law Student (at no charge)

Credit Card: American Express VISA Master Card Discover

Card No.: _____ Exp.Date: _____

Cardholder Name: _____

Check No. _____ *Make checks payable to UMKCCLE.*

Course materials: will be provided in electronic format only and accessible with your laptop, tablet or other mobile device during the event. Final course materials, parking directions and a map will be mailed one week prior to the event.

On-site registrations are welcome: however, seating and/or meals cannot be guaranteed unless you pre-register.

Parking: On-campus parking permits will be mailed to those who register at least one week prior to the event. Later registrants may pick up a parking permit at the registration desk on the day of the event.

No shows will not receive a refund or credit voucher. No shows requesting refunds due to emergency or hardship must be received in writing no more than 30 days after the event date. Substitutions for paid registrations are accepted.

Special accommodations can be made by contacting UMKC CLE at 816-235-1648 prior to the event date.

UMKC CLE is committed to offering affordable continuing education events, products and services. Registrants unable to afford seminar fees due to financial hardship may apply for a waiver or reduced fee in writing no later than 72 hours before the event. Hardship discounts and waivers will not be granted on-site on the day of the event. For more information contact UMKC CLE at 816-235-1648 or email UMKCCLE@UMKC.EDU.

2018-2019 Estate Planning Fundamentals/Intermediate Committee

Committee Chair: Jim Cole
Country Club Trust Company, N.A.

Scott Blakesley
Spencer Fane LLP

Donald Friend II
Friend & Associates, LLC

M. Suzanne (Suzy) Hall
Country Club Trust Company

Rachel Horvath
Creative Planning

Evan M. Lange
The Signatry

Daniel J. McCarroll
UMKC Law School Continuing Legal Education

Russell E. Utter, Jr.
BridgeBuilder Tax+Legal Services, P.A.

Seth Snyder
UMKC Law School Continuing Legal Education

Andrew S. Felker
Chinnery Evans & Nail, PC

Jerald J. Cook
The Cook Law Firm

Paul R. Himmelstein
Van Osdol, PC

Jessica M. Kinnard
BKD, LLP

Rebecca Lanter Godfrey
UMB Bank

Craig C. Reaves
Reaves Law Firm, PC

Thomas Ruane
Polsinelli, PC

Corey Ziegler
Greater Kansas City Community Foundation

KCEPS: Three Events Preparing You to Better Serve Your Clients and Your Company in the Field of Estate Planning

The Kansas City Estate Planning Symposium is made up of trust and estate professionals from the fields of law, accounting, trust administration, investment services and life insurance. KCEPS events help those at every stage of their career – from students to seasoned professionals – advance in their knowledge and expertise in the field of estate planning, while providing career-enhancing networking opportunities. KCEPS presents three events annually to meet you where you are in your career path and help you grow to the next level.

Fundamentals of Estate Planning • October 2019 – a one-day event for individuals new to the field, or those who could use a refresher on the state of estate planning.

Intermediate Estate Planning • February 1, 2019 – a half-day, deep-dive program for anyone who wants to be more meaningfully engaged in an estate-planning practice.

Annual Conference • Thursday-Friday, April 25-26, 2019 – the Midwest's leading estate planning event, presenting nationally recognized speakers addressing topics covering every facet of estate planning. A two-day event.

**To register or for more information,
visit kceps.org or email umkccle@umkc.edu**

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