



# Jump Start - or ReEnergize - Your Practice with Estate Planning Fundamentals 2020

Thursday  
October 22, 2020  
Via Webcast Only

Fundamentals is a one-day basic program focused on the topics and challenges encountered in today's practice. Presented by working professionals from the various disciplines of estate planning, Estate Planning Fundamentals is an insightful introduction for professionals new to estate planning or to those who would benefit from a refresher course. This program will prove valuable for lawyers, trust officers, CPAs, fundraising executives, and all estate planning professionals.

## Presented live via webcast

In the days of COVID-19, with the challenges of travel and getting together in person, KCEPS Estate Planning Fundamentals will be held as a live webcast, allowing participants to attend from any location, via computer, tablet or smartphone. Don't miss this opportunity to jump-start or reenergize your career, with these basics of the profession.

Cost: \$125 • Law Students Attend Free

### Continuing Education Credit:

CLE: MO 8.0, incl. 1.0 Elimination of Bias

KS 8.0 incl. 1.0 ethics

IA 6.5, incl. 0.75 ethics

NE 5.99, incl. 0.83 ethics

CPE: 8.0 hours

CFP CE: Pending

CFRE CE: Pending

### Insurance credit:

Kansas: 8.0 hours

Missouri: Pending

## Here's what past attendees are saying about Fundamentals:

*"I appreciate that the speakers adhered to the fundamentals and did not assume a lot of prior knowledge. The materials will be very helpful. Good range of topics."*

*"Even though I've done some estate planning, I learned a lot. Great job."*

*"Very highly [recommended]. Everything runs so fluidly. Not a single irrelevant or less-than-captivating topic. Loved the panel discussion."*

*"Best [CLE] I have been to."*



More information and online registration  
at [KCEPS.org](http://KCEPS.org). Visit [law.umkc.edu/cle](http://law.umkc.edu/cle), email  
[UMKCCLE@UMKC.EDU](mailto: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

**Webcast access**

8:00 AM

**Would You Rather Have This Sleek, Modern Revocable Trust or This Tawdry, Outdated Will?**

H. Joseph Price, Jr., *Dysart Taylor Cotter McMonigle & Montemore, P.C.*

8:30 AM

**Creating Revocable Trust Agreements: Important Clauses and Drafting Tips**

Erin L. Anderson, *Commerce Trust Company*

9:20 AM

**Trust Funding and Non-Probate Transfers**

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

9:50 AM

**Break**

10:05 AM

**POA & Health Care Directives**

Christopher M. Hawkins, *Creative Planning Legal, P.A.*

10:35 AM

**Insurance and Annuities in Estate Planning**

Lynn Mayabb, *BKD Wealth Advisors*

11:10 AM

**Digital Assets**

Alice M. Haseltine, *Kirkland Woods & Martinson LLP*

11:45 AM

**Break**

12:30 PM

**Basics of Income Taxation of Trusts**

Donald Friend, II, *Friend & Associates, LLC*

1:00 PM

**Medicaid Eligibility and Special Needs Trusts**

Stacey Janssen, *Sandberg Phoenix & Von Gontard P.C.*

1:30 PM

**Are You SECURE in Your IRA and Qualified Plan Knowledge?**

Kevin Conley, *Baker University*

2:20 PM

**Break**

2:35 PM

**Charitable Giving in 2020: Tax Incentives That Make it a Great Year to Give**

Corey Ziegler, *Greater Kansas City Community Foundation*

3:05 PM

**Ethics: Elimination of Bias in Estate Planning**

Prof. Julie M. Cheslik, *UMKC Law School*

3:55 PM

**Adjournment**

\*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.

# REGISTRATION FORM

Estate Planning Fundamentals 2020

Thursday, October 22, 2020  
Via Webcast

**KCEPS Estate Planning Fundamentals 2020: Seminar 8:00 am – 3:55 pm (with breaks)**

## Ways to pre-register



### ONLINE

[umkclaw.link/fundamentals2020](http://umkclaw.link/fundamentals2020)



### PHONE

816-235-1648



### FAX

816-235-6552



### MAIL

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

## Registration

KFU96

Name: \_\_\_\_\_

Occupation (attorney, CPA, financial planner, trust officer, etc): \_\_\_\_\_

Primary legal practice area (if attorney): \_\_\_\_\_

If primarily estate planning, how many years? \_\_\_\_\_

Firm: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Office Phone: \_\_\_\_\_ E-Mail Address: \_\_\_\_\_

## Payment Information

\$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.

**Day-of the event registrations are welcome, however, pre-registration is suggested.**

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](mailto:UMKCCLE@UMKC.EDU).

# 2020-21 Estate Planning Fundamentals Planning Committee

## Committee Co-Chairs:

**Andrew S. Felker**  
Chinnery Evans & Nail, PC

**M. Suzanne (Suzy) Hall**  
Country Club Trust Company

## Program Chair:

**Jerald J. Cook**  
The Cook Law Firm

## Committee:

**Scott Blakesley**  
Spencer Fane LLP

**Donald Friend II**  
Friend & Associates, LLC

**Heath Hoobing**  
Seigfreid Bingham, P.C.

**Rachel Horvath**  
Creative Planning

**Jessica M. Kinnard, CPA**  
BKD, LLP

**Evan M. Lange, J.D.**  
The Signatry

**Thomas Ruane**  
Polsinelli, PC

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

**Corey Ziegler**  
Greater Kansas City  
Community Foundation

## UMKC CLE:

**Seth Snyder**  
UMKC Law School CLE

## 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 22, 2020** – 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 • Late January, 2021** – A half-day, deep-dive program for anyone who wants to be more meaningfully engaged in an estate-planning practice. Offered in late January/early February each year.

**Annual Conference • Thursday-Friday, April 22-23, 2021** – 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](http://kceps.org) or email [umkccl@umkc.edu](mailto:umkccl@umkc.edu)  
816-235-1648**