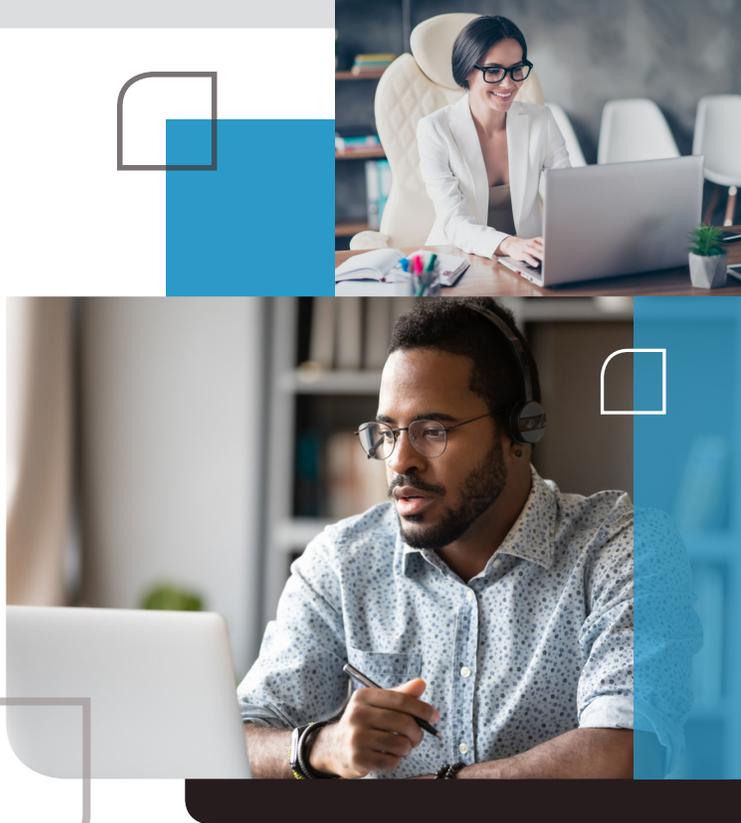




Announcing Intermediate Estate Planning 2021

**Friday, January 29, 2021
Live Via Virtual Platform**

Registration Fee: \$125.00



Attend this event live via virtual platform from the safety and security of your home or office, on your desktop, tablet or smartphone.

Intermediate Estate Planning offers a half-day deep-dive exploration of two real-world estate planning topics encountered by every estate planner. It provides an essential bridge between the basic "Fundamentals"

event and the national-caliber educational experience of the KCEPS Annual Conference.

Intermediate Estate Planning 2021 is a "can't miss" program for anyone who wants to be more knowledgeable and engaged in an estate planning practice. This program is highly valuable for lawyers, trust officers, CPAs, fund-raising executives, and all estate planning professionals.

Continuing Education Credit:

**Missouri 4.0 hours • Kansas 4.0 hours
CPA, CFP, CFRE, Insurance credit pending**

For additional information and to register online, please visit www.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

8:00 AM

Webcast Access

8:30 AM

Just Because It's Irrevocable Does Not Mean It's Irrevocable!

Alice Haseltine, Kirkland Woods & Martinson LLP, Liberty, MO

Occasions may arise such that clients want to fix-up, freshen-up or totally blow-up irrevocable trusts. This presentation will discuss avenues for modifying irrevocable trusts, both judicially and nonjudicially, under Missouri and Kansas law. The presentation will include a discussion of nonjudicial settlement agreements, judicial modifications of charitable and noncharitable trusts, division and combination of trusts, decanting, tax considerations and current developments in trust modifications.



Alice Haseltine is an attorney at Kirkland Woods & Martinson LLP, who practices in the areas of estate planning and probate and trust administration. Alice works with individual clients in the preparation of Wills, Revocable Trusts, Irrevocable Trusts and other estate planning documents. A substantial portion of Alice's practice is devoted to advising clients in the areas of estate, gift and generation-skipping transfer tax planning. Alice earned her B.A. from the University of Virginia, and she earned her J.D. from the University of Missouri.

10:10 AM

Break

10:20 AM

Beyond the Basics and Adjusting Your Practice to the 2020s

H. Joseph Price, Jr., Dysart Taylor Cotter McMonigle & Montemore, P.C., Kansas City, MO

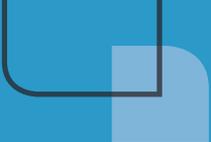
The legislative developments of the last three years have caused estate planners to shift their focus from estate and gift taxes to income tax and asset protection. However, the developments of the last 12 months – legislative and otherwise – have presented a whole new set of issues for estate planners to concern themselves with, including the SECURE Act, the CARES Act and the practical hardships brought about by the COVID-19 pandemic. Dysart Taylor partner Joe Price discusses the issues and opportunities facing the estate planner in 2021 and beyond, with a particular emphasis on the "Mass Affluent" client with a net worth of between three- and six-million dollars.



Joe Price is a Shareholder/Director and Group Leader of the Tax & Estate Planning Department at the Dysart Taylor law firm. He has been an Adjunct Professor at the UMKC Law School since 1998. He was the President of the Estate Planning Society in 2014, the Chairman of the Kansas City Estate Planning Symposium in 2005 and the Institute Co-Chairman of the Heart of America Tax Institute in 1992. He was inducted into the Estate Planning Society Hall of Fame in 2018.

12 noon

Adjourn



2021 Estate Planning Fundamentals/Intermediate Planning Committee

Committee Co-Chairs:

Andrew S. Felker
Chinnery Evans & Nail, PC

M. Suzanne (Suzy) Hall
Country Club Trust Company

Program Chair:

Jessica M. Kinnard, CPA
BKD, LLP

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Bridge Builder Tax
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Creative Planning

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.

Intermediate Estate Planning • January 29, 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, presented exclusively via webcast for 2021.

Fundamentals of Estate Planning • October 2021 – a one-day event for individuals new to the field, or those who could use a refresher on the state of estate planning.



**To register or for more information, visit [kceps.org](https://www.kceps.org)
or email umkccl@umkc.edu • 816-235-1648**

