



Join Us for the 40th Kansas City Estate Planning Symposium Annual Conference

**Via Virtual Platform Only –
Thursday, April 22 &
Friday, April 23, 2021**

The Midwest's Premier Estate Planning Event is Now Accessible Nationwide

With the nation in the throes of a pandemic, this virtual-platform-only event will let you engage from the convenience and safety of your home or office, saving you travel time, expenses, and days away from your practice. This focused and concise two-day conference will provide information that will help you advance your career and better serve your clients.

- › Learn from the nation's leading speakers at a fraction of the cost of other leading national conferences.
- › Enjoy timely, in-depth coverage of topics of critical importance to everyone engaged in estate planning.
- › Earn up to a year's worth of Continuing Education Credits.

**Presented in cooperation with the University
of Missouri Kansas City School of Law**



This event will include critical information for everyone involved in estate planning

- › Business and Tax Attorneys
- › CFPs®/ Financial Planners
- › Charitable Organizations
- › CPAs
- › Estate Planning Attorneys
- › Life Underwriters
- › Planned Giving Professionals
- › Trust Officers

Don't miss this opportunity to learn from the nation's leading experts and sharpen the professional skills that will enhance your career and help you better serve your clients and organization.

**For complete details or to register online,
visit KCEPS.org or call 816-235-1648**

2021 Chairperson: Shellie Billau

Midwest Trust Company • Overland Park, Kansas

KCEPS Annual Conference

PROGRAM SCHEDULE

Now in its 40th year, the Kansas City Estate Planning Symposium Annual Conference offers national-caliber speakers addressing topics of critical concern to participants in the field of estate planning.

Thursday, April 22, 2021

7:30 AM Virtual Platform Access

8:00 AM Welcome and Introductory Remarks

2021 Chairperson: Shellie Billau • *Midwest Trust Company*

8:15 AM The Estate Planner's Guide to Recent Developments

This informative and entertaining session will recap important cases, rulings, regulations, and legislation of interest to estate planning professionals, with an emphasis on federal income, estate, and gift taxes.



Prof. Samuel A. Donaldson
Georgia State University College of Law
Atlanta, Georgia

9:30 AM Break

9:50 AM Ethical and Professional Challenges of Dealing with Elder Financial Abuse

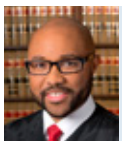
The nest eggs of America's elders are in the crosshairs of scammers and fraudsters who target elders due to the frailties and vulnerabilities that often accompany aging. This session will explore the challenges that lawyers and other estate planning professionals face in protecting these potential victims without unnecessarily trampling on their right to self-determination.



Prof. Mary F. Radford
Prof. of Law Emerita
Georgia State University College of Law
Atlanta, Georgia

10:40 AM Irrevocable: I Do Not Think That Word Means What You Think It Means

There are many potential ways to modify or terminate an irrevocable trust, including amendments, court modifications and decanting. However, the options and rules vary from state to state. This presentation will look at options under the Uniform Trust Code (UTC) and the laws of various states.



Hon. Mark A. Styles
16th Judicial Circuit Court of
Jackson County, Missouri Division
Kansas City, Missouri



Kevin Conley, JD
Baker University
Baldwin City, Kansas

11:55 AM Break

1:00 PM Dealing with Non-Probate Transfers: The Good, the Bad and the Ugly

We all are well-informed about avoidance of probate through the use of funded revocable trusts. There are many other ways to title assets to avoid probate, such as joint accounts, beneficiary designations, and Transfer on Death designations. This presentation will review these options, when they can be helpful, and what can go wrong when using them.



Thomas W. Abendroth, JD
Schiff Hardin LLP
Chicago, Illinois

1:50 PM American Charitable Bequests Across the Centuries: Insights on the Decision-Making Processes Used By Americans Who Include Charitable Giving As Part of Their Estate Plans

How are charitable estate gifts made? Who makes them and who doesn't? When do they get added or dropped? Who competes for these gifts? Where does the money really come from? What clients will be most interested and when will they want to add these components? This presentation answers these questions by reviewing the realities of charitable estate giving across centuries of data and includes historical lessons for modern practice.



Prof. Russell N. James III
Texas Tech University
Lubbock, Texas

2:40 PM Break

3:00 PM We All Have It – How to Recognize and Interrupt Unconscious Bias

Despite our best intentions, research shows we all have it – unconscious, unintentional bias. Unconscious attitudes and beliefs are shaped by all kinds of influences – some of which we would not agree with or accept on a conscious level. Yet, these unconscious thoughts influence decision-making and can have a profound impact in the workplace as well as lawyers' work product and relationships with clients, judges, juries, and witnesses. The key is to learn how to recognize your own unconscious biases as well as practical ways to interrupt them. In this interactive session, attendees will engage in a competitive game and visualization exercise, as well as create their own personal action plans to interrupt unconscious bias.



Kathleen B. Nalty, JD
Kathleen Nalty Consulting, LLC
Denver, Colorado

4:40 PM Networking Social

Friday, April 23, 2021

7:30 AM Virtual Platform Access

8:00 AM Announcements and Introductions

2021 Chairperson: Shellie Billau - *Midwest Trust Company*

8:15 AM 2021 IRA and Retirement Planning Update

This session will cover the best retirement tax planning strategies and how to identify the clients who will benefit most from them. The program will focus on IRA estate planning after the SECURE Act, recent Court cases and IRS rulings that will apply to all clients with retirement accounts.



Ed Slott, CPA
Ed Slott and Company, LLC
Rockville Centre, New York

9:55 AM Break

10:15 AM Don't Get Lost in Cyberspace: How to Plan For and Administer Digital Assets

This presentation covers estate planning for digital assets and access to digital assets after a person's death. The Revised Uniform Fiduciary Access to Digital Assets Act will be discussed in detail.



Prof. Gerry W. Beyer
Governor Preston E. Smith Regents Professor of Law, Texas Tech University School of Law
Lubbock, Texas

11:05 AM Planning for Discretionary Distributions: The Garment is Larger than its HEMS

Many will and trust form books default to ascertainable discretionary standards in order to minimize adverse estate tax consequences under Code Section 2041. These standards provide trustees with very little flexibility to respond creatively to beneficiaries' needs. This presentation will explore the wide range of discretionary standards, permissible and impermissible distributions, tax consequences, several case studies, and illuminate the need for broader discretion to serve contemporary beneficiaries and their families.



R. Hugh Magill, JD
Northern Trust Corporation
Chicago, Illinois

11:55 AM Break

1:00 PM Ten Tips and Tricks for Subchapter J Junkies

For those practitioners addicted to the income taxation of trusts, this session will highlight ten planning ideas you can use to impress your clients. The session will cover a number of fiduciary income tax elections available to a trustee and offer some drafting tips that will allow you to get the results your client desires.



Jeremiah W. Doyle, IV, JD
BNY Mellon Wealth Management
Boston, Massachusetts

1:50 PM Keeping it All in the Family: Business Succession Planning Strategies to Keep the Family and the Business Intact

Keeping a business in the family is harder today than ever. As trusted advisors to the business and the family we need to understand their objectives and the environment in which they operate and bring wisdom and guidance to the table. The planner's toolkit is full of useful strategies but the value comes in understanding how and when to use them. This session will provide a practical approach to business succession planning, including the tips, traps, and common mistakes to avoid with family-owned businesses.



Ann Burns, JD
Lathrop GPM LLP
Minneapolis, Minnesota

2:40 PM Break

3:00 PM Mistakes Are Not Always Happy Accidents

This program will address some of the most common estate tax and drafting mistakes inadvertently made by estate planning attorneys; including (1) powers of appointment and marital trusts; (2) defined terms and malpractice issues; (3) per stirpes pitfalls; (4) powers of appointment and the rule against perpetuities; (5) estate tax apportionment provisions; and many more.



Lauren Wolven, JD
Levenfeld Pearlstein, LLC
Chicago, Illinois

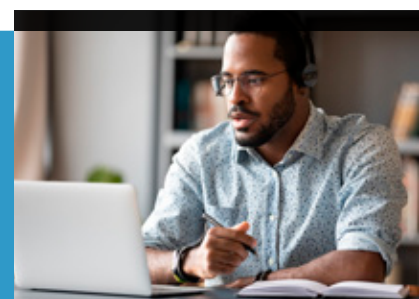
3:50 PM Avoiding the Hidden Pitfalls in Planning Between Spouses: Where Valuable Tax Planning Intersects with Ethical Obligations

A discussion of the ethical rules of representing spouse and spouse, and the difficulties of maximizing relationships with clients while following these guidelines; the impact the recent estate tax laws have on asset titling with spouses; changing assets during marriage and its effect on divorce or dissolution; communications and the duty to disclose; when not to represent spouse and spouse; and pitfalls to avoid during representation.



Louis S. Harrison, JD
Harrison & Held, LLP
Chicago, Illinois

4:40 PM Closing Remarks and Adjourn



REGISTRATION

For complete details or to register online, visit KCEPS.org or call 816-235-1648.

Pricing options include:

\$385

Two-day attendance, with digital course materials

\$250 (either day)

One-day attendance with digital course materials

Continuing Education Credit

For information on other CLE programs visit law.umkc.edu/cle

This program is designed to qualify for up to 16.0 hours including 2.0 ethics and 2.0 elimination of bias credit. See www.KCEPS.org for specific approval for individual jurisdictions and credit for attorneys, accountants, trust officers, certified financial planners, fund raising executives and insurance professionals.



About the Kansas City Estate Planning Symposium

KCEPS offers three events annually, to help estate planning professionals from diverse disciplines better serve their clients and their companies.


KCEPS events help individuals at every stage of their careers – from students to seasoned professionals – advance their knowledge and expertise in the field of estate planning, while providing career-enhancing networking opportunities. The three events offered by the Kansas City estate Planning Symposium annually meet you where you are in your career path, and help you grow to the next level. Please join us.


To register or for more information on any of these events, visit KCEPS.org.

Intermediate Estate Planning – A half-day, deep-dive program for anyone who wants to be more meaningfully engaged in an estate-planning practice. This event is held annually in late-January/early February.

Annual Conference – The Midwest's leading estate planning event, the KCEPS Annual Conference presents nationally recognized speakers addressing topics covering every facet of estate planning. This two-day event is held on a Thursday and Friday in April each year.

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

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