KCEPS
KANSAS CITY ESTATE PLANNING SYMPOSIUM
www.kceps.org

Jump Start – or Re-Energize – Your Estate Planning Practice

ANNOUNCING ESTATE PLANNING FUNDAMENTALS 2021

Thursday, October 21, 2021
Exclusively Via Virtual Platform

Registration Fee: $125.00

Reserve your place today:
register now at KCEPS.org

Join us live from the convenience of your home or office.

Estate Planning Fundamentals is a one-day, basic program focused on the topics and challenges encountered in today's estate planning practice. Event faculty is made up of working professionals representing all aspects of estate planning. This is an insightful introduction for professionals new to the field, or for those who would benefit from a refresher course. This event will have great value for lawyers, trust officers, CPAs, fundraising executives, and all estate planning professionals.

Join us from anywhere you are – to enhance your knowledge and career from your office or home.

Continuing Education Credit:

This program is designed to qualify for up to 8.0 hours including 0.6 hour of elimination of bias credit. See KCEPS.org for details and credit for attorneys, accountants, trust officers, certified financial planners, fund raising executives and insurance professionals.

UMKC
School of Law

To register, or for information, visit KCEPS.org.

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

Schedule

Thursday, October 21, 2021
Presented Live, Exclusively
Via Virtual Platform

8:00 AM	***Webcast Access Open***
8:25 AM	***Welcome and Announcements***

8:30 AM

Wills v. Trusts: Choosing the right Cornerstone for Each Estate Plan

Michael Keenan, *Creative Planning*

Wills and trusts are the cornerstones of estate planning. You will learn the differences between using a will-based estate plan and a trust-based estate plan and the factors to examine when determining which option is best for each client, including asset types, distribution provisions, and income and estate tax consequences.

9:00 AM

The Top 5, 6 or 7 Spooky Probate Mysteries (To Our Clients!)

Anne-Linton Pond Hendrickson, *Complete Estate & Probate Law*

This session will highlight certain issues that every estate planning practitioner should be aware of regarding the probate process when advising their clients. From the importance of preserving a will to the time frame for probate, the discussion will aid in providing excellent planning services which will result in a rewarding probate experience.

9:30 AM

Using Trusts for Special and/or Unusual Situations

Scott E. Blakesley, *Spencer Fane LLP*

Revocable Trusts (to avoid probate) and trusts for minors are the most common types of trusts, and they are not the subject of this presentation. This session will cover other situations where the use of a trust might be beneficial to accomplish the client's specific goals. This will include trust planning ideas for ownership of family vacation homes, life insurance policies, divorce protection for children, pet care, gift and estate tax planning, preserving generational wealth, protecting assets for the benefit of children from prior marriages; and sharing the wealth with charities.

10:20 AM ***Break***

10:30 AM

IRA Planning after the SECURE and CARES Acts

Brenda Einck, *BKD CPAs & Advisors*

The Secure Act and CARES Act made changes to IRA contributions, distributions, and beneficiary definitions. These Acts also made other changes indirectly impacting IRA decision making. In this session, we will be covering some of these changes and how they affect IRA planning.

11:05 AM

LGBTQ Inclusive Planning Considerations

Heather L. Counts, *The Counts Law Firm, LLC*

(This session qualifies for 0.6 hour elimination of bias credit.)

This session will cover basic definitions and a discussion of issues critical to the representation of LGBTQ clients, including the impact of legal marriage, key questions to ask, considerations for minor children, and inclusive drafting.

11:35 AM

Missouri & Kansas Financial and Medical POAs (and Advance Directives)

***McKinley L. Duke**, Husch Blackwell LLP*

In this session, you will learn the statutory requirements for both Missouri and Kansas Financial and Medical Powers of Attorney, along with Advance Directives (Living Wills). It will also touch on practical considerations in drafting the same.
(This session is pre-recorded.)

12:05 PM

Lunch break

12:45 PM

Trust Agreements (Understanding Standard Trust Provisions & Drafting Tips)

***Erik M. Rome**, Sage Law*

This session will cover the basics of drafting trust agreements, including a review of standard trust provisions. We will also cover drafting tips and tricks for attorneys new to the estate planning practice

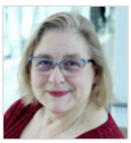
1:35 PM

POA & Healthcare Directives Panel

Power of Attorney and Healthcare Directives Panel Discussion – This discussion will focus on how financial and medical institutions work with power of attorney documents. It will cover common challenges both organizations face and how attorneys can better help their clients in the drafting process so that everything is in place when an individual becomes unable to handle his or her own affairs.

Abdul Al Hamamsy
University of Kansas Health System

Terence Fitzpatrick
Country Club Bank



Carla Keirns, MD, PhD
KU Hospital

Stacey Janssen
Kennyhertz Perry, LLC

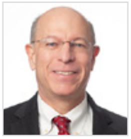
2:25 PM

Break

2:35 PM

Estate, Gift and Generation Skipping Tax Fundamentals

***David G. Watkins**, Swanson Bernard LLC*



This session will focus on the basic rules of estate and gift taxation, including proposed changes that may be on the horizon.

3:05 PM

Medicare Eligibility

***Courtenay Brummer**, Mylo, a Lockton Company*

This session is a high-level overview of the parts of Medicare, enrollment periods and options for supplemental coverage. This presentation will answer questions about when you should enroll in Medicare, how much you will pay for Medicare, and how to avoid late enrollment penalties.

3:35 PM

Tips to Build your Estate Planning practice from Year One

***Rochelle B. Falk**, Polsinelli, P.C.*

Estate Planning is more than just drafting a will, it is relationship building with your clients and other professionals. Whether you are an associate right out of law school at a small, medium, or big firm, starting your own solo estate planning firm, or adding estate planning to your existing practice, there are things you want to consider in building your practice, marketing to your target client, and systems to put into place to better serve your clients.

4:05 PM

Adjourn

*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.

Details and Registration Information: Estate Planning Fundamentals 2021

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Upcoming from KCEPS:

Join us for Intermediate Estate Planning, Friday, January 21st, 2022, 8:00 to 12:00. The cost to attend is $125.00. For details, please visit KCEPS.org

For information visit KCEPS.org, email lori@mahergroupllc.com or call 816-832-7815.

2021 Fundamentals of Estate Planning Committee

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Chinnery Evans & Nail, PC

M. Suzanne (Suzy) Hall
Country Club Trust Company

Program Chair:

Jessica M. Kinnard, CPA
BKD CPAs & Advisors

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Spencer Fane LLP

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The Cook Law Firm

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