



# ANNOUNCING INTERMEDIATE ESTATE PLANNING

**Friday, January 21, 2022**  
**In Person and Virtual  
Attendance Options**

- **In Person:**

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

- **Virtual Via Zoom**

**Registration Fee: \$125.00**

**Reserve your place today:  
register now at [KCEPS.org](http://KCEPS.org)**

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**Join us live on the campus of the  
University of Missouri Kansas City –  
or virtually from the convenience of  
your home or office.**

Intermediate Estate Planning offers a half-day thorough exploration of two essential estate planning topics encountered frequently by estate planning professionals. It provides an essential bridge between the basic “Fundamentals” event and the national-caliber educational experience of the KCEPS Annual Symposium.

Intermediate Estate Planning 2022 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:**

**This program is designed to qualify for up to  
4.0 hours of continuing education credit.**

**See [KCEPS.org](http://KCEPS.org) for details and credit for  
attorneys, accountants, trust officers, certified  
financial planners, fund raising executives and  
insurance professionals.**



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**To register, or for information, visit [KCEPS.org](http://KCEPS.org).**

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

# Schedule

Friday, January 21, 2022

Live Via Virtual Platform, and In Person on the  
Campus of University of Missouri – Kansas City

8:00 AM

**Webcast Access**

8:30 AM

## **Estate Planning Documents: Trying to Avoid Traps with Drafting Mistakes**

**Susan B. Teson**, *Kirkland Woods & Martinsen, LLP*



Susan's presentation will cover common mistakes in the drafting of trusts, wills and powers of attorney and how to avoid them. Mistakes can occur in any type of document but tend to occur more frequently with dispositive and administrative provisions, failure to include "magic language," problems with fiduciary succession and not adequately coordinating multiple documents.

Susan B. Teson is Of Counsel with Kirkland, Woods & Martinsen, LLP, Liberty, Missouri. She focuses on estate planning and trust and estate administration and supports the firm with its fiduciary litigation practice. She also served in various management, leadership and oversight roles in her career at UMB, including serving as Private Wealth Senior Legal Counsel and leading Private Wealth's legal team, real estate and unique assets administration and the trust tax team. She worked extensively with practitioners in reviewing and drafting complex estate planning documents. Ms. Teson is a member of the Missouri and Kansas Bars, is a graduate of UMKC School of Law (1982), and is an adjunct professor there, teaching estate planning and drafting. She is a frequent speaker on various estate planning topics, including drafting issues.

10:10 AM

**Break**

10:20 AM

## **An Intermediate Dive into Estate and Gift Tax Planning, Including Potential New Legislation**

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



David will review the current status of the estate and gift tax regime, including changes to the tax rules that may be implemented by Congress as of the new year. He will also review traditional estate tax planning techniques that may be adversely affected by those changes.

David joined Swanson Bernard LLC in 2003. He has experience in all phases of estate planning and administration, including litigation related to estate matters. He also has experience regarding business planning and corporate transaction matters, including the preparation of business succession agreements, employment related agreements and other employment matters.

David also has experience in matters of real estate. He works extensively in forming nonprofit charitable organizations and obtaining tax-exempt status for those organizations. David also concentrates in matters of elder law and understands the unique needs of seniors and their families.

12:00 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.

# 2022 Intermediate Estate Planning Committee

## Program Chair: Jessica M. Kinnard, BKD, LLP

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

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

### Program Chair:

**Jessica M. Kinnard, CPA**  
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Country Club Trust Company,  
N.A. (retired)

### Ex-Officio:

**Lori Maher McCombs**  
Executive Director, Kansas City  
Estate Planning Symposium

**Daniel J. McCarroll**  
Director, Continuing Legal  
Education, UMKC Law School

## KCEPS: Meeting You Where You are in Your Estate Planning Career – and Helping You Reach the Next Level



### 2022 Programs

The Kansas City Estate Planning Symposium is comprised 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 21, 2022 – A half-day, intensive program for anyone who wants to be more meaningfully engaged in an estate-planning practice.

**KCEPS Annual Symposium** • Thursday and Friday April 28-29, 2022 – The Midwest's leading estate planning event, presenting nationally recognized speakers addressing topics covering every facet of estate planning.

**Fundamentals of Estate Planning** • October 2022 – A one-day event for individuals new to the field, or for those who could use a refresher on the state of estate planning.

**To register, or for more information,  
visit [KCEPS.org](http://KCEPS.org) or call 816-832-7815**

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