Register Online at
sites.duke.edu/depc/
or complete the form below and return by mail or fax.

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Registration Application Form

Name_______________________________________
(last) *(first)* *(middle initial)*

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____
(city) *(state)* *(zip)*

Office Telephone (____) ____________________

E-mail Address ________________________________

My Name Tag Should Read:

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$ ___________check enclosed for ____ registration(s) at $450
(or $415 if postmarked by September 7, 2015)

Credit Card Number

____

Name listed on card____________________________

Type of card_______________ Expiration______________

Make check payable to
Duke University Estate Planning Conference
and mail with form(s) to:

Duke University Conference and Event Service
Estate Planning Conference
036 Bryan University Center
Box 90847
Durham, NC 27708-0847

Or fax to: (919) 660-1769

If you register multiple persons from your firm, please submit a photocopied registration application form for each additional registrant to include with the firm check.

Registration questions should be directed to Duke University Conference Center & Event Services by email at conferenceservices@duke.edu or by phone at (919) 660-1760.

Program questions should be directed to Alyssa Alegre at (919) 681-8030 or depc@law.duke.edu

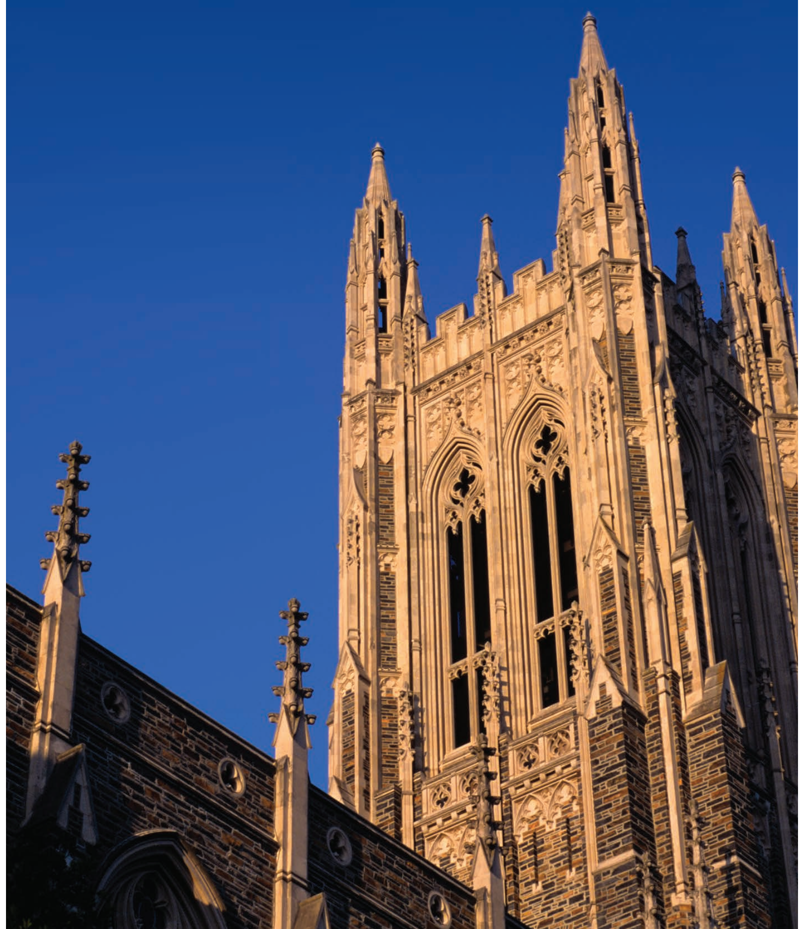
Register early and save!

DUKE UNIVERSITY ESTATE PLANNING CONFERENCE

Duke University Office of Gift Planning
Box 90600
Durham, NC 27708

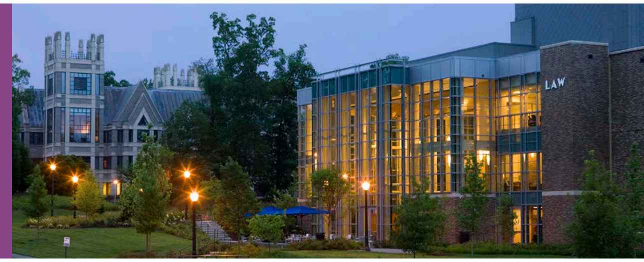
DUKE UNIVERSITY 37TH ANNUAL ESTATE PLANNING CONFERENCE

OCTOBER 15-16, 2015



Duke University Estate Planning Conference
October 15–16, 2015

The Duke University Estate Planning Council, in association with Duke University School of Law, is pleased to present the 37th annual Duke University Estate Planning Conference.



Conference Objectives & Description

To examine in detail current developments in the estate and gift tax field.

To strengthen the practitioner's knowledge and application of estate planning techniques to a multitude of diverse and complex problems.

To provide a forum for the discussion of important estate planning problems and their solutions.

The course objectives will be met by a series of lecture sessions over a two-day period. At the commencement of the conference, a detailed outline will be provided for each subject to be covered.

The conference faculty is comprised of estate planning and tax practitioners and legal scholars. Faculty members have been selected for their knowledge of the subject, teaching skills, and ability to communicate clearly.

Registrants will receive continuing education credit hours upon approval by each individual state and individual group. Credits will be awarded for actual time in attendance.

No advance preparation required or pre-requisites necessary.

Level of course material: Intermediate

The Duke Estate Planning Conference is not registered as a sponsor of continuing professional education courses with NASBA's National CPE Sponsor Registry. Pursuant to the North Carolina State Board of Accountancy's Administrative Code 21 NCAC 08G .0404(f) a CPA may claim credit for a course offered by a non–registered sponsor (except ethics) provided that the course meets the requirements of 21 NCAC 08G .0403(c), 21 NCAC 08G .0404, and 21 NCAC 08G .0409. The CPA shall maintain documentation proving that the course met these standards.

Register online at: sites.duke.edu/depc/

schedule

37TH Annual Duke Estate Planning Conference

October 15-16, 2015 Duke University School of Law, Durham, NC

All sessions to be held in Room 3041

THURSDAY, OCTOBER 15

7:00 – 8:15 a.m. *Registration & Continental Breakfast*

8:15 – 8:30 a.m. Welcome & Opening Remarks

8:30 – 9:30 a.m. TOPIC: Review of the Past Year's Significant, Curious or Downright Fascinating Fiduciary Cases
SPEAKER: Dana G. Fitzsimons Jr.

9:30 – 9:40 a.m. *Break*

9:40 – 11:10 a.m. TOPIC: The Estate Planner's Perspective on Recent Developments — The Year in Review
SPEAKER: John B. O'Grady

11:10-11:20 a.m. *Break*

11:20 – 12:20 p.m. TOPIC: Venn Diagrams: The Intersection of Estate & Income Tax (Planning in the ATRA-Math)
SPEAKER: Paul S. Lee, J.D., LL.M.

12:20 – 1:20 p.m. *Lunch*

1:20 – 2:20 p.m. TOPIC: Coping with Death and Incapacity in the Digital Age - How UFADAA Will Help
SPEAKER: Suzanne Brown Walsh

2:20 – 2:30 p.m. *Break*

2:30 – 3:30 p.m. TOPIC: Ethics and Technology in a Trusts and Estates Practice
SPEAKERS: David E. Lieberman and Steven K. Mignogna

3:30 – 3:40 p.m. *Break*

3:40 – 4:55 p.m. TOPIC: Getting to "Yes" with Your Client's IRA Custodian
SPEAKERS: Svetlana V. Bekman and Timothy H. Guare

FRIDAY, OCTOBER 16

8:00 – 8:30 a.m. *Continental Breakfast*

8:30 – 9:30 a.m. TOPIC: Trust Design: The Most Important Part of the Estate Plan
SPEAKER: David A. Handler, P.C.

9:30-9:40 a.m. *Break*

9:40 – 10:40 a.m. TOPIC: Philanthropic Planning: Designing and Defending Charitable Gift Opportunities with Non-Liquid Assets
SPEAKER: Donald M. Etheridge, Jr.

10:40 – 10:50 a.m. *Break*

10:50 – 12:05 p.m. TOPIC: Trustee Compliance with the Prudent Investor Rule and its Evolving Progeny: Investing for Total Return Versus a Certain Level of Traditional Income
SPEAKERS: Benjamin H. Pruett, Brett D. Sovine, and Julian W. Walker, Jr.

12:05– 1:05 p.m. *Lunch*

1:05 – 2:05 p.m. TOPIC: Ticking Time Bombs in the GST Tax
SPEAKER: Thomas W. Abendroth

2:05 – 2:15 p.m. *Break*

2:15 – 3:15 p.m. TOPIC: Putting "Success" Back into Business Succession
SPEAKER: Thomas J. Pauloski, J.D.

To view the detailed agenda, please visit:
sites.duke.edu/depc/agenda

37TH ANNUAL DUKE ESTATE PLANNING CONFERENCE FACULTY LIST

Thomas W. Abendroth
Schiff Hardin LLP
Chicago, IL

Svetlana V. Bekman
The Northern Trust Company
Chicago, IL

Donald M. Etheridge, Jr.
The National Christian Foundation
Alpharetta, GA

Dana G. Fitzsimons Jr.
Bessemer Trust
Atlanta, GA

Timothy H. Guare
Timothy H. Guare, PLC
Richmond, VA

David A. Handler
Kirkland & Ellis LLP
Chicago, IL

Paul S. Lee
The Northern Trust Company
New York, NY

David E. Lieberman
Levin, Schreder & Carey, LTD
Chicago, IL

Steven K. Mignogna
Archer & Greiner, P.C.
Haddonfield, NJ

John B. O'Grady
McGuireWoods LLP
Richmond, VA

Thomas J. Pauloski, J.D.
Bernstein Global Wealth Management
Chicago, IL

Benjamin H. Pruett
Bessemer Trust
Washington, DC

Brett D. Sovine
Brown Brothers Harriman Trust Company, N.A.
Charlotte, NC

Julian W. Walker, Jr.
Attorney at Law – Consulting/Testifying Trustee Expert
Columbia, SC

Suzanne Brown Walsh
Murtha Cullina LLP
Hartford, CT

CONFERENCE LOCATION

All sessions of the two-day educational program will be held at Duke University School of Law on Duke's West Campus. Parking will be available in the Science Drive Visitor Lot, just a short walk from the Law School building.

REGISTRATION

The registration fee for attending the conference is $450 payable by check or credit card. This includes all sessions, course materials, continental breakfasts, and luncheons. *(Registrations completed online or post-marked by September 7, 2015, may subtract $35 from the fee.)* A group rate of $375 per registrant is available to firms registering three or more employees (all registrations must be completed at the same time to receive discount). IRS employees will receive a rate of $225 per registrant. You may register for the conference online at **sites.duke.edu/depc/** or by completing the attached registration form and returning it with payment to the address indicated or by fax.

Space is limited, therefore it is suggested that you register as soon as possible. **Registrants unable to attend the conference, for a valid reason, will receive a refund if notice of cancellation is received one week prior to the conference.**

CONTINUING EDUCATION CREDIT

This program is designed to qualify for approximately 12 hours of continuing education credit for professional training requirements; however, hours may vary by profession. The conference will be submitted for CLE in the states of North Carolina, South Carolina, Georgia, Tennesee, and Virginia. Approval will also be requested for Certified Financial Planners and Bankers/Trust Officers. Accountants will be responsible for submission of their attendance to their individual CPE administrators. **All necessary documentation for filing continuing education credit will be available at the conference registration desk on Friday afternoon.**

ACCOMMODATIONS

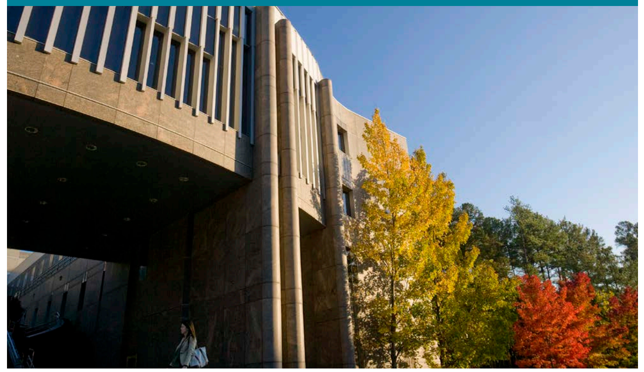
You will need to make your own hotel reservations for your stay during the conference. For your convenience, a block of rooms has been reserved at the Washington Duke Inn, 3001 Cameron Blvd., Durham, NC 27706 with a reduced conference rate of $189 plus tax per night. To reserve a room in the block please contact the Inn at (800) 443-3853 and reference Group #485697 or use the link and directions on the DEPC website to book online. Reservations must be made by September 15, 2015, to receive the conference rate. A list of alternative local accommodations is also available on the DEPC website.

WHILE VISITING DUKE

While visiting Duke you may also wish to explore the historic campus; take a stroll through the beautiful Sarah P. Duke Gardens; hike one of the many Duke Forest trails; tour the Nasher Museum of Art; or journey through the showcase of Duke's athletic accomplishments in Cameron Indoor Stadium, the Hall of Honor, and the Hall of Fame.

For further information on these and other opportunities at Duke, please visit the DEPC website.

sites.duke.edu/depc/



THE DUKE UNIVERSITY ESTATE PLANNING COUNCIL

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