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

Registration Application Form

Name ______________________________
(last) *(first)* *(middle initial)*

Firm Name ______________________________

Firm Address ______________________________
(P.O. Box or Street Name)

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

Office Telephone (____) ______________________

E-mail Address ______________________________

My Name Tag Should Read:

____

$ ___________check enclosed for ____ registration(s) at $450
(or $415 if postmarked by September 5, 2014)

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!

FIRST CLASS MAIL
U.S. POSTAGE
PAID
DURHAM, NC
PERMIT NO. 60

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

DUKE UNIVERSITY ESTATE PLANNING CONFERENCE

36TH ANNUAL

DUKE UNIVERSITY ESTATE PLANNING CONFERENCE

OCTOBER 16-17, 2014

Duke University Estate Planning Conference
October 16–17, 2014

The Duke University Estate Planning Council, in association with Duke University School of Law, is pleased to present the 36th 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 the N.C. State Board of CPA Examiners. CPAs may claim credit for courses offered by sponsors not registered with the Board, however, they must meet the standards found at 21 NCAC 8G.0400.

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

schedule

36TH Annual Duke Estate Planning Conference

October 16-17, 2014 Duke University School of Law, Durham, NC

All sessions to be held in Room 3041

THURSDAY, OCTOBER 16

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

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

8:30 – 10:00 a.m. TOPIC: An Estate Planner's Perspective on Recent Tax Developments – The Year in Review
SPEAKER: Howard M. Zaritsky

10:00 – 10:15 a.m. *Break*

10:15 – 11:15 a.m. TOPIC: Decanting: Refining a Vintage Trust
SPEAKER: Susan T. Bart

11:15-11:25 a.m. *Break*

11:25 – 12:25 p.m. TOPIC: Recent Developments in Fiduciary Litigation
SPEAKER: Bruce S. Ross

12:25 – 1:25 p.m. *Lunch*

1:25 – 2:25 p.m. TOPIC: What is a Trust?
SPEAKER: Ronald D. Aucutt

2:25 – 2:35 p.m. *Break*

2:35 – 3:35 p.m. TOPIC: How Retirees Should Tend Their Hedges: It's Not Just About Gardening Anymore
SPEAKERS: Audrey G. Young and Thomas J. Pauloski, J.D.

3:35 – 3:45 p.m. *Break*

3:45 – 4:45 p.m. TOPIC: International Planning
SPEAKER: Douglas Siegler

FRIDAY, OCTOBER 17

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

8:30 – 10:00 a.m. TOPIC: Estate Planning for Same-Sex Couples
SPEAKERS: George D. Karibjanian and Patricia Cain

10:00-10:15 a.m. *Break*

10:15 – 11:15 a.m. TOPIC: Recent Valuation Developments and Trends: Making the Best of the Relationship with Your Valuation
SPEAKERS: Curtis R. Kimball and David T. Lewis

11:15-11:25 a.m. *Break*

11:25 – 12:25 a.m. TOPIC: I Used to be Rich, but then Congress Raised the Exclusion: Planning for Estates Under $10 Million
SPEAKER: Thomas W. Abendroth

12:25– 1:25 p.m. *Lunch*

1:25 – 2:55 p.m. TOPIC: How to Practice Law, Abide by the Rules of Professional Conduct, and have a Life that Rules
SPEAKERS: Nancy C. Hughes and Louis S. Harrison

2:55 – 3:05 p.m. *Break*

3:05 – 4:05 p.m. TOPIC: Planning for the 3.8% Surtax and the 23.8% Tax on Trust Capital Gains: 21 Ways (and Counting) to have a Trust's Capital Gain Taxed to the Beneficiary
SPEAKER: John Goldsbury

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

36TH ANNUAL DUKE ESTATE PLANNING CONFERENCE FACULTY LIST

Thomas W. Abendroth
Schiff Hardin LLP
Chicago, IL

Ronald D. Aucutt
McGuireWoods LLP
Tysons Corner, VA

Susan T. Bart
Sidley Austin LLP
Chicago, IL

Patricia Cain
Santa Clara University
Santa Clara, CA

John Goldsbury
U.S. Trust, Bank of America Private Wealth Management
Charlotte, NC

Louis S. Harrison
Harrison & Held, LLP
Chicago, IL

Nancy C. Hughes
Hughes & Scalise, P.C.
Birmingham, AL

George D. Karibjanian
Proskauer Rose LLP
Boca Raton, FL

Curtis R. Kimball
Willamette Management Associates
Atlanta, GA

David T. Lewis
Johnston Allison & Hord Attorneys
Charlotte, NC

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

Bruce S. Ross
Holland & Knight LLP
Los Angeles, CA

Douglas L. Siegler
Sutherland Asbill & Brennan LLP
Washington, DC

Audrey G. Young
McGladrey LLP
Chicago, IL

Howard M. Zaritsky
Rapidan, VA

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 5, 2014, may subtract $30 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 recieve a rate of $225 per registrant. You may register for the conference online at **http://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 12.50 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, Tennesse, 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

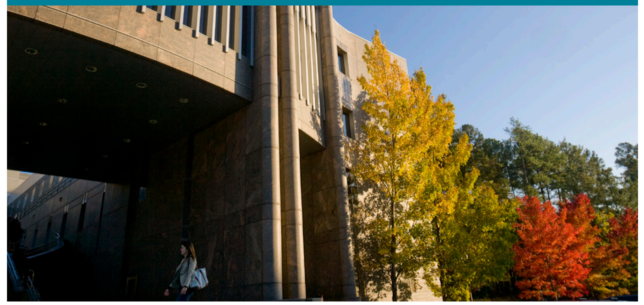
You will need to make your own hotel reservations for your stay during the conference. For your convenience, a block of rooms has been reserved at the Washington Duke Inn, 3001 Cameron Blvd., Durham, NC 27706 with a reduced conference rate of $184 plus tax per night. To reserve a room in the block please contact the Inn at (800) 443-3853 and reference Group #436312 or use the link and directions on the DEPC website to book online. Reservations must be made by September 16, 2014, 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; visit the Duke Chapel; 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. College football fans may want to make arrangements to stay for an upcoming Blue Devils game.

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

http://sites.duke.edu/depc/



THE DUKE UNIVERSITY ESTATE PLANNING COUNCIL

Thomas W. Abendroth	Glenn E. Ketner, Jr.
Jean T. Adams	Neal W. Knight, Jr.
William A. Brackney	Ralph McCaughan
Gwendolyn C. Brooks	Jerry J. McCoy
Phillip H. Buchanan	Anne M. McKinney
Richard W. Buhrman	John T. Midgett
Jean Gordon Carter, *chair*	Michele A. Mobley
James P. Cox, III	Roger A. Pond
Robert T. Danforth	Richard L. Schmalbeck
Mark B. Edwards	Michael C. Sholtz
John V. Elliott	Douglas L. Siegler
Donald M. Etheridge, Jr.	Myron E. Sildon
Charles D. Fox, IV	Georgiana J. Slade
James C. Hardin, III	Joseph W. Tynan
Elizabeth Leverage Hilles	Julian W. Walker, Jr.
C. Gray Johnsey	Audrey G. Young

GOLD SPONSOR

Willamette Management Associates

SILVER SPONSORS

Brown Brothers Harriman

BRONZE SPONSORS

hclsm Harris Crouch Long Scott & Miller, Inc.
BNY Mellon Wealth Management
Leland Little Auction & Estate Sales
Old North State Trust, LLC
Brown Advisory
WealthCounsel
Wells Fargo The Private Bank
interactive legal