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 University 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 .0409, 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 .0409(a), 21 NCAC 08G .0409(b), and 21 NCAC 08G .0409. The CPA shall maintain documentation proving that the course met these standards.

Register early and save!
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 lunchrooms. (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.

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, Tennessee, 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 after the conference.

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 27708 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.