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.
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.

OCTOBER 16-17, 2014
DUKE UNIVERSITY
ESTATE PLANNING CONFERENCE

Register online at: http://sites.duke.edu/depc/
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. Karbiñjian 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
CONFERENCE FACULTY LIST
Thomas W. Abendroth
Schiller Healy Baroni 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 Goldsberry
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. Karbiñjian
Peacock Rose LLP
Boca Raton, FL
Curtis R. Kimball
Wilmington Management Associates
Atlanta, GA
David T. Lewis
Johnston Allison & Hood 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
McGuireWoods LLP
Chicago, IL
Howard M. Zaritsky
Rapidsan, VA

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

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 – 12:35 p.m. Lunch
12:35 – 1:25 p.m. TOPIC: What is a Trust? SPEAKER: Ronald D. Aucutt
1:25 – 2:25 p.m. Break
2:25 – 3:35 p.m. TOPIC: How Retirees Should Tread Their Hedges: It’s Not Just About Gardening Anymore SPEAKERS: Audrey G. Young and Thomas J. Pauloski, J.D.
3:35 – 4:35 p.m. Break
3:45 – 4:45 p.m. TOPIC: International Planning SPEAKER: Douglas Siegler

THURSDAY, OCTOBER 16
8:00 – 10:00 a.m. Recent Tax Developments – The Year in Review
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

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 $50 from the fee.) A group rate of $375 per registrant is available to firms registering three or more employees. Any sessions 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 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, Tennessee, and Virginia. Approval will also be sought for Taxation Financial Planners and Bankers’ Trust Officers. Attorneys shall 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 27708 with a reduced 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 #43612 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 DUCK
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/