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.

No advance preparation required or pre-requisites necessary.

Level of course material: Intermediate
THANK YOU FOR ATTENDING THE 38TH ANNUAL DUKE ESTATE PLANNING CONFERENCE OCTOBER 13–14, 2016 DUKE UNIVERSITY SCHOOL OF LAW, DURHAM, NC

All sessions will be held in Room 3041

THURSDAY, OCTOBER 13

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: New Developments in Estate, Gift, and Generation Skipping Taxes
SPEAKER: Charles D. Fox IV
9:30 – 9:40 a.m.  Break
9:40 – 10:40 a.m.  TOPIC: Estate Planning in Today’s Political Environment: Washington Outlook
SPEAKER: Ronald D. Aucutt
10:40 – 10:50 a.m.  Break
10:50 – 11:50 a.m.  TOPIC: Planning for Estates of Couples Under $10 Million
SPEAKER: Stephen R. Akers
11:50 – 1:00 p.m.  Lunch
1:00 – 2:00 p.m.  TOPIC: Complying with the New Consistency of Basis Rules and Other Practical Strategies for Filing Estate and Gift Tax Returns
SPEAKER: Audrey G. Young
2:00 – 2:10 p.m.  Break
2:10 – 3:10 p.m.  TOPIC: Modern Uses of Partnerships in Estate Planning
SPEAKER: Paul S. Lee
3:10 – 3:20 p.m.  TOPIC: A Whole New Playbook is Here—The Differing Roles Filled by the Trust Director
SPEAKER: Kathleen R. Sherby
3:20 – 4:20 p.m.  TOPIC: The Prerogatives of Privilege: The Ethics of Protecting Our Planning Clients
SPEAKERS: N. Todd Angkatavanich & Richard L. Drees

FRIDAY, OCTOBER 14

8:00 – 8:30 a.m.  Continental Breakfast
8:30 – 9:30 a.m.  TOPIC: Advanced Planning With Generation Skipping Transfers
SPEAKER: Thomas W. Abendroth
9:30 – 9:40 a.m.  Break
9:40 – 10:40 a.m.  TOPIC: Triangulation—Integrating Life Insurance into the Estate and Investment Plans
SPEAKER: Thomas J. Pauloski
10:40 – 10:50 a.m.  Break
10:50 – 11:50 a.m.  TOPIC: Estate Planning in Today’s Political Environment: Washington Outlook
SPEAKER: Ronald D. Aucutt
11:50 – 1:00 p.m.  Lunch
1:00 – 2:00 p.m.  TOPIC: The Ethics of Protecting Our Planning Clients
SPEAKERS: Phillip H. Buchanan & Charles D. (“Skip”) Fox IV
2:00 – 3:00 p.m.  TOPIC: Complying with the New Consistency of Basis Rules and Other Practical Strategies for Filing Estate and Gift Tax Returns
SPEAKER: Audrey G. Young
3:00 – 4:00 p.m.  TOPIC: Differing Roles Filled by the Trust Director
SPEAKER: Kathleen R. Sherby
4:00 – 5:00 p.m.  Closing Remarks

38TH ANNUAL DUKE ESTATE PLANNING CONFERENCE FACULTY LIST

Thomas W. Abendroth
Schiff Hardin LLP

Charles D. (“Skip”) Fox IV
McGuireWoods LLP

Stephen R. Akers
Besemer Trust

Paul S. Lee
The Northern Trust Company

N. Todd Angkatavanich
Withers Bergman

Stephanie Loomis-Price
Winter stad PC

Ronald D. Aucutt
McGuireWoods LLP

Kerry L. M. Mast
Brown Brothers Harriman & Co.

Edward J. Beckwith
BakerHostetler

Thomas J. Pauloski
Bernstein Global Wealth

Turney P. Berry
Wyatt, Tarrant & Combs

Management

Phillip H. Buchanan
Duke University

Kathleen R. Sherby
Bryan Cave LLP

Juli A. Buschman
Besemer Trust

Kristy M. Sides
Wells Fargo

Richard L. Drees
McDermott Will & Emery LLP

Audrey G. Young
RSM US

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, Texas, Tennessee, and Virginia. Approval will also be requested for Chartered 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 27708 with a reduced rate of $189 plus tax per night. To reserve a room in the block please contact the hotel at (800) 443-3853 and reference Group #527264 or use the link and directions on the DEPC website to book online. Reservations must be made by September 14, 2016, 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; tour Duke’s three-mile 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.