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 .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 .0404(f), 21 NCAC 08G .0404(g), and 21 NCAC 08G .0409. The CPA shall maintain documentation proving that the course met these standards.

Register online at 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 $435 if postmarked by August 31, 2017)

Optional: Please add $45 if you would like printed materials.

Credit Card Number ____________________________________________

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!
THURSDAY, OCTOBER 12

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: Recent and Pending Transfer Tax Developments – Part I
SPEAKERS: Ronald Aucutt and Stephen Akers
9:30 – 9:40 a.m.  Break
9:40 – 10:40 a.m.  TOPIC: Recent and Pending Transfer Tax Developments – Part II
SPEAKERS: Ronald Aucutt and Stephen Akers
10:40 – 10:50 a.m.  Break
10:50 – 11:50 a.m.  TOPIC: Fiduciary Litigation Topics in Depth
SPEAKER: Jessica Urcatgeui
11:50 – 1:00 p.m.  Lunch
1:00 – 2:00 p.m.  TOPIC: Asset Protection after 20 Years
SPEAKER: Jack Terrill, II
2:00 – 2:10 p.m.  Break
2:10 – 3:10 p.m.  TOPIC: The Tax and Practical Basics of Private Foundations
SPEAKER: Alan Rothschild
3:10 – 3:20 p.m.  Break
3:20 – 4:20 p.m.  TOPIC: Recent and Pending Transfer Tax Developments – Part I
SPEAKERS: Ronald Aucutt and Stephen Akers
4:20 – 5:20 p.m.  TOPIC: Pixar for Estate Planners: Who Gets Your Digital Stuff When You’re Logged Off for the Final Times
SPEAKER: Robert Kirkland

FRIDAY, OCTOBER 13

8:00 – 8:30 a.m.  Continental Breakfast
8:30 – 9:30 a.m.  TOPIC: Income Tax Developments
SPEAKER: Andrea Chomakos
9:30 – 9:40 a.m.  Break
9:40 – 10:40 a.m.  TOPIC: Discretionary Distributions: The Gamble is Bigger than HEMS
SPEAKER: R. Hugh Magill
10:40 – 10:50 a.m.  Break

39TH Annual Duke Estate Planning Conference
October 12-13, 2017 Duke University School of Law, Durham, NC

All sessions to be held in Room 3041

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, electronic materials, continental breakfasts, and luncheons. (Registrations completed online or post-marked by August 31, 2017, 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. Please add $45 if you would like printed materials.

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 13 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 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 $109 plus tax per night. To reserve a room in the block please contact the Inn at (800) 443-3853 and reference Group #596600 or use the link and directions on the DEPC website to book online. Reservations must be made by September 11, 2017, 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, take 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.