

2017 TECHNICAL FORUM

Tuesday, January 31, 2017

7:30 a.m. - 6 p.m.



in conjunction with

**McGEORGE
SCHOOL OF
LAW** LAWYERS FOR
WHAT'S NEXT.

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| 7:30 – 8:00 | Registration and Breakfast |
| 8:00 – 8:10 | Opening Remarks |
| 8:10 – 9:10 | M. Read Moore – A New World Order for Estate Planners (or Why Is It So Difficult to Open a Bank Account?) |
| 9:10 – 10:10 | M. Read Moore – The Devil Is In the Details: Important Tax Administration and Procedural Rules for Estate Planners |
| 10:10 – 10:25 | Break |
| 10:25 – 11:25 | M. Read Moore – Frozen Brain: Estate Planning Strategies for QTIP Trust Assets |
| 11:25 – 12:25 | Lunch |
| 12:25 – 2:25 | John Prokey and Mark Higgins – Legal Aspects / Issues with Valuations |
| 2:25 – 2:35 | Break |
| 2:40 – 3:40 | Matt Clausen – Charitable Gifts of Business Interests |
| 3:45 – 4:45 | Shane Nolan – Alternative Investments |
| 4:45 – 5:00 | Closing Remarks |
| 5:00 – 6:00 | Wine Reception |