

# agenda

## 2020 ESTATE PLANNING FORUM

McGEORGE SCHOOL OF LAW . FRIDAY, JANUARY 31, 2020 . 7:30 AM – 5:30 PM

7:30 – 8:00	Registration and Breakfast
8:00 – 8:10	Opening Remarks
8:10 – 9:10	Keith Schiller – How to Use Estate Tax Returns to Reduce or Avoid Income Taxes
9:10 – 10:10	Keith Schiller – Reconfiguring or Decanting the Formerly “Perfect” Estate Plan
10:25 – 11:55	Robert Keebler – Retirement Plan Disasters: How to Avoid and Fix Them
11:55 – 12:55	Lunch/Scholarship Presentations
1:00 – 2:30	Robert Keebler – The SECURE Act: Responding to the “10-Year Rule” Effective January 1, 2020
2:45 – 3:45	Justin Miller – Secrets of Successful Families: Transferring Values with Wealth for a Lasting Legacy
3:50 – 4:00	Closing Remarks
4:00 – 5:30	Networking/Mixer/Reception