

2023 ESTATE PLANNING FORUM

Friday, May 19, 2023

8:00 a.m. - 4:30 p.m.



UNIVERSITY OF THE
PACIFIC
McGeorge School of Law

8:00 – 8:30	Registration and Breakfast
8:30 – 8:40	Opening Remarks: Damaris Perez – President
8:40 – 10:15	Bryan Clontz – “Top 10 Charitable Trends Every Advisor Should Know in 2023”
10:15 – 10:25	Break
10:25 - 11:55	Andrew Katzenstein and Thomas Pauloski – “Over-Rated? How Surging Interest Rates and Slow Growth May Radically Change Wealth Transfer Planning”
11:55 – 12:55	Lunch / McGeorge Scholarship Presentation
12:55 – 3:00	Paul Lee – Conquering Subchapter K(ryptonite): Fundamentals of Partnership Taxation for Estate Planners
3:00 – 3:15	Snack Break
3:15 – 4:15	Karen Sugihara - Tales from the Darkside: What Corporate Fiduciaries Wish Advisors Would Consider and Discuss with Clients
4:15 – 4:30	Closing Remarks
4:30 – 5:45	Networking/Mixer/Wine Reception