

THE RED SHIELD SYMPOSIUM
NEW NAME, SAME FOCUS ON ESTATE PLANNING!
FORMERLY THE ESTATE & CHARITABLE GIFT PLANNING INSTITUTE
AGENDA

OCTOBER 16, 2018 – 8:00 A.M. – 4:00 P.M.

DOORS OPEN & REGISTRATION:	8:00 a.m. – 8:45 a.m.
OPENING REMARKS:	8:45 a.m. – 8:59 a.m.
ESTATE PLANNING IN 2018: <ul style="list-style-type: none">• 2017 tax law• Status of basis consistency proposed regulations• IRC Section 642(c) development• Portability• Grantor trusts—substitution of assets• Decanting• Changing trust situs	9:00 a.m. – 10:30 a.m.
<u>BREAK (morning):</u>	10:30 a.m. – 10:45 a.m.
WHEN ACTIONS SPEAK LOUDER THAN WORDS: <ul style="list-style-type: none">• Charitable remainder trust disqualified• Decanting declared void• Grantor trust inadvertently created• Charitable deduction squandered	10:45 a.m. – 11:45 a.m.
QUESTIONS & ANSWERS:	11:45 a.m. – 12:15 p.m.
<u>LUNCH:</u>	12:15 p.m. – 1:00 p.m.
THE SALVATION ARMY IN YOUR COMMUNITY: <ul style="list-style-type: none">• Updates from your local Salvation Army on how Planned Gifts truly make a difference.	1:00 p.m. – 1:30 p.m.
DESIGNING & ADMINISTERING TRUST DISTRIBUTION MECHANISMS: <ul style="list-style-type: none">• Benchmarks for distributions• Absolute discretion• Ascertainable or objective standards• Proper drafting of discretionary distribution language• Trustee as beneficiary• Loans to beneficiaries	1:30 p.m. – 2:30 p.m.
<u>BREAK (afternoon):</u>	2:30 p.m. – 2:45 p.m.
ETHICS ISSUES FACING TRUSTS & ESTATES PRACTITIONERS: <ul style="list-style-type: none">• Screening clients to avoid problems before they develop• Ethics dilemmas in asset protection planning• Representing clients with diminished capacity• Obligations of lawyer after representation has become dormant	2:45 p.m. – 3:45 p.m.
QUESTIONS & ANSWERS:	3:45 p.m. – 4:00 p.m.