

THURSDAY–SATURDAY, JULY 12–14, 2018

53RD ANNUAL

FIDUCIARY LAW INSTITUTE

THE KING AND PRINCE
BEACH AND GOLF RESORT

12 CLE Hours

1 ETHICS HOUR

1 PROFESSIONALISM HOUR

3 TRIAL PRACTICE HOURS



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A G E N D A

WEDNESDAY, JULY 11, 2018

PRESIDING:

Blake N. Melton, Program Chair; Chair, Fiduciary Law Section, State Bar of Georgia; Senior Wealth Strategist, Synovus Family Asset Management, Columbus

- 5:00 **WELCOME RECEPTION** in the Delegal Room at the King & Prince Hotel (ends at 7:00). Hosted and sponsored by the **Estate Planning and Probate Section of the Atlanta Bar Association**. All attendees and their guests are welcome.

THURSDAY, JULY 12, 2018

- 7:45 **REGISTRATION & CONTINENTAL BREAKFAST**
(All attendees must check in upon arrival.
A removable jacket or sweater is recommended.)
- 8:25 **WELCOME AND PROGRAM OVERVIEW**
Blake N. Melton
- 8:30 **DO YOU LIKE MY HAT? THE ETHICS OF LAWYERS SERVING AS FIDUCIARIES**
LeAnne M. Gilbert, Partner, Gaslowitz Frankel LLC, Atlanta
Rebecca G. Cummings, Attorney and Professional Fiduciary, Godbey Cummings Law and GA Fiduciary Services, Atlanta
- 9:30 **BEYOND OUR BORDERS: OPPORTUNITIES AND PITFALLS WHEN PLANNING ACROSS STATE LINES**
Dana B. Perry, Shareholder, Chambliss Bahner & Stophel PC, Chattanooga TN
Patricia D. Friedman, Shareholder, The Bowden Spratt Law Firm PC, Atlanta

- 10:30 **BREAK**

10:45 **MIXED MOTIVES: UNDERSTANDING AND ADVISING TODAY'S PHILANTHRO-CAPITALISTS**
Cassady V. "Cass" Brewer, Associate Professor, Georgia State University College of Law, Atlanta

11:45 **PLANNING FOR DISCRETIONARY DISTRIBUTIONS: THE GARMENT IS BIGGER THAN ITS HEMS**
R. Hugh Magill, Executive Vice President, Chief Fiduciary Officer and Global Director of Trust Services, Northern Trust Corporation, Chicago IL

12:45 **RECESS**

6:30 **RECEPTION** in the Delegal Room at the King & Prince Hotel (ends at 7:30)

FRIDAY, JULY 13, 2018

PRESIDING:

Mary B. Galardi, Immediate Past Chair, Fiduciary Law Section, State Bar of Georgia; Galardi Law, Atlanta

7:30 **CONTINENTAL BREAKFAST**

8:30 **TRUMPING UNCERTAINTY: QUANTITATIVE ESTATE PLANNING UNDER THE LEGISLATION FORMERLY KNOWN AS THE TAX CUTS AND JOBS ACT**

Thomas J. Pauloski, National Managing Director of Wealth Strategies, Bernstein Private Wealth Management, Chicago IL

9:30 **THE UNIFORM LAW COMMISSION: WHO ARE THEY AND WHY SHOULD I CARE?**

Benjamin A. Orzeske, Chief Counsel, The Uniform Law Commission, Chicago IL

10:30 **BREAK**

10:45 **PREVENTING HEIRS PROPERTY THROUGH ESTATE PLANNING**

Skipper G. StipeMaas, Executive Director, Georgia Heirs Property Law Center, Atlanta
Joann E. Johnston, Legal Programs Director, Georgia Heirs Property Law Center, Atlanta

11:45 **GEORGIA LEGISLATIVE UPDATE**
T. Kyle King, Hodges McEachern & King, Jonesboro

12:45 **RECESS**

1:30 **GOLF TOURNAMENT**
GOLF PRIZES SPONSORED BY APPLIED ECONOMICS
(Lunch included in cost of golf registration fee.)

SATURDAY, JULY 14, 2018

PRESIDING:

Margaret W. Scott, Chair-Elect, Fiduciary Law Section, State Bar of Georgia; Alston & Bird LLP, Atlanta

7:30 **CONTINENTAL BREAKFAST**

8:30 **ESTATE PLANNING FOR MARRIED COUPLES WITH LESS THAN \$22M: SIMPLE, RIGHT?**

Jacob L. Kaplan, Associate, Alston & Bird LLP, Atlanta

L. Alyson Graham, Associate, Smith Gambrell & Russell LLP, Atlanta

9:30 **TAX CUTS AND JOBS ACT: A SUMMARY OF THE LANDMARK TAX REFORM LEGISLATION AND ITS IMPACT ON INDIVIDUALS AND SMALL BUSINESSES**

Courtney Bazemore, Principal, Windham Brannon, Atlanta

10:30 **BREAK**

10:45 **THE PLANNER AS LITIGATOR: BLAZING YOUR TRAIL CONFIDENTLY TO THE COURTHOUSE**

Richard E. Barnes, Barnes Law, LLC, Valdosta

11:45 **FIDUCIARY LITIGATION UPDATE**

Mary F. Radford, Professor of Law, Georgia State University College of Law, Atlanta

12:45 **ADJOURN**

THE KING AND PRINCE BEACH AND GOLF RESORT

201 Arnold Road • St. Simons Island, Georgia • 800-342-0212

MAKE ROOM RESERVATIONS NOW

We have reserved a block of rooms at the King & Prince for our attendees. *The cutoff for reservations in this block is **June 11, 2018.***

Be sure to specify that you are attending the Fiduciary Law Institute sponsored by ICLE. ICLE must meet certain minimum food & beverage and hotel room pickup requirements or ICLE will face attrition and/or meeting room rental fees. In order for ICLE to continue to provide a reasonable registration fee, we need your help. Please take advantage of the room rate we have negotiated and make your reservations by calling 800-342-0212 and identifying yourself as an attendee of the Fiduciary Law Institute.

CANCELLATION POLICY

Cancellations reaching ICLE by 5:00 p.m. the day before the seminar date will receive a registration fee refund less a \$25.00 administrative fee. Otherwise, the registrant will be considered a "no show" and will not receive a registration fee refund. Program materials will be shipped after the program to every "no show." Designated substitutes may take the place of registrants unable to attend.

SEMINAR REGISTRATION POLICY

Early registrations must be received 48 hours before the seminar. ICLE will accept on-site registrations as space allows. All attendees must check in upon arrival and are requested to wear name tags at all times during the seminar. ICLE makes every effort to have enough program materials at the seminar for all attendees. When demand is high, program materials must be shipped to some attendees.

EARLY REGISTRATION PAYMENT OPTIONS

Mail: ICLE • PO Box 117210 • Atlanta, GA 30368-7210 (make check payable to ICLE)

Online: iclega.org (credit card payment only)

Early registrations must be received 48 hours before the seminar. Questions, Call ICLE: 678-529-6688

Duplicate registrations may result in multiple charges to your account. A \$15 administrative fee will apply to refunds required because of duplicate registrations.

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EARLY REGISTRATION FEE: \$335

ON-SITE REGISTRATION FEE: \$410

On-site Registration Payment Options:

- **ICLE cannot accept cash.**
- *ICLE accepts checks (make check payable to ICLE).*
- *Debit Cards, Visa, Mastercard, and American Express are accepted.*
- *On-site registrants must pay at the time of the on-site registration.*

- I will participate in the Institute's golf tournament on Friday afternoon.
I enclose \$105 per player.

**EARLY REGISTRATIONS
MUST BE RECEIVED 48
HOURS BEFORE THE
SEMINAR.**

NAME _____ GEORGIA BAR # _____

FIRM/COMPANY _____ OFFICE PHONE _____

EMAIL _____

(To receive seminar notification and registration confirmation by email only.)

MAILING ADDRESS _____ ZIP + 4 _____

STREET ADDRESS _____ ZIP + 4 _____

CITY _____ STATE _____

I am sight impaired under the ADA and I will contact ICLE immediately to make arrangements.

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