Estate Planning in Depth 2018

Go broad and dig deep at this renowned estate planning conference!

JUNE 25 - 28, 2018
MADISON, WI

Cosponsored by Continuing Legal Education for Wisconsin (CLEW)
PLANNING CHAIRS (also on faculty)

Stuart C. Bear
Chestnut Cambronne PA

Stephanie B. Casteel
Wallace Morrison & Casteel LLP

FACULTY

David M. Allen
Katten Muchin Rosenman LLP

Steven M. Bonneau
Senior Tax Counsel & Senior Vice President, Northern Trust Corporation

Dana G. Fitzsimons, Jr.
Principal and Fiduciary Counsel, Bessemer Trust

Wendy S. Goffe
Stoel Rives LLP

Michael M. Gordon
Gordon, Fournaris & Mammarella, P.A.

L. Timothy Halleron
McDermott Will & Emery

Christopher R. Hoyt
Professor of Law, University of Missouri-Kansas City

Benetta P. Jenson
J.P. Morgan

Kim Kamin
Chief Wealth Strategist and Advisor, Gresham Partners

Beth Shapiro Kaufman
Caplin & Drysdale, Chartered

Stephanie Loomis-Price
Winstead PC

Nicole K. Mann
McDermott Will & Emery

Victoria Pambianco Ose
McDermott Will & Emery

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

Francis J. Rondoni
Chestnut Cambronne PA

Stacy E. Singer
Senior Vice President, Northern Trust Corporation

Cynthia R. Woods
Woods Law PLLC

Jane Zhao
McDermott Will & Emery

ALI CLE Program Staff:
Robert Rushton (rrushton@ali-cle.org)
How often do you get the chance to attend a CLE program that’s so unique you’ll want to tell your colleagues about it as soon as it’s over? That’s the type of experience practitioners receive when they attend Estate Planning in Depth, one of the most comprehensive programs available for today’s estate planners. Set against the bucolic backdrop of the University of Wisconsin, this renowned summer conference takes a deep dive into the practical matters that estate planners face every day and delivers strategies and techniques that can be put to use immediately.

Join a national faculty to explore the gamut of hot topics and current developments, as well as today’s most pressing estate planning issues and their solutions in-depth. The optional pre-conference in-person session on wealth transfer taxation serves as the perfect primer to the main course. Expert panels throughout the program address such weighty topics as the impact of tax reform on estate planning; planning for families in the 21st century; drafting techniques to bullet-proof estate planning documents; sophisticated charitable giving strategies; effective grantor trust planning; considerations when selling a family business; and advice on navigating fiduciary minefields.

As always, the conference provides ample and enjoyable opportunities to learn from and socialize with faculty and attendees from across the country. From beginning to end, the engaging learning atmosphere encourages group discussion and a full examination of the issues. And whether it’s mingling with faculty at the evening reception, catching up with colleagues at the course picnic, or relaxing under the stars while taking in a free outdoor concert by the Wisconsin Chamber Orchestra, you’ll be sure to appreciate the program’s one-of-a-kind ambiance, as well as its unparalleled instruction.

**Program Overview**

Get practical strategies and expert insights on the issues that matter most to estate planners.

*WEBCAST: 29.25 CLE CREDIT HOURS, INCLUDING 2.00 HOURS OF ETHICS; 35.00 CPE CREDIT HOURS IN TAXATION (group internet-based program without optional Sunday session)
Monetary policies and their implementation can be complex, requiring a deep understanding of financial markets and global economics.
As always, the conference provides ample and enjoyable opportunities to learn from considerations when selling a family business; and advice on navigating fiduciary documents; sophisticated charitable giving strategies; effective grantor trust planning; strategies and techniques that can be put to use immediately.

The optional pre-conference in-person session on wealth transfer taxation serves as well as today’s most pressing estate planning issues and their solutions in-depth.

How often do you get the chance to attend a CLE program that's so unique you'll encourage others to third time attending. “Love the real life examples!” I plan on returning. “The faculty was fabulous. This is my third time attending and I plan on returning.

Mandatory CLE Credit

ALI CLE programs are generally accredited in all MCLE jurisdictions. Credit in CO is available by reciprocity; credit in ID, LA, and RI is available upon request. For specific information on accreditation in your state, e-mail TeamMCLE@ali-cle.org, go to http://www.ali-cle.org/mcle, or call 1-800-CLE-NEWS.

CPE Credit

ALI CLE is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors through its website: www.learningmarket.org. For more information regarding ALI CLE’s administrative policies, such as complaint and refund, please call Customer Service at (800) CLE-NEWS. CPE credit hours for this course: 39.5 in Taxation (group-live) 35 in Taxation (group internet-based programs)
Join a national faculty to explore the gamut of hot topics and current developments, deep dive into the practical matters that estate planners face every day and delivers insights on the issues that matter most. Calling this a CLE program that is so unique is not just a marketing slogan; it is the truth. How often do you get the chance to attend a CLE program that's so unique you'll want to tell your colleagues about it as soon as it's over? That's the type of experience we'll deliver on June 27 and 28, 2018.

**Estate Planning in Depth 2018**

**Program Highlights**
- **Pre-conference In-person Session:** The optional pre-conference in-person session on wealth transfer taxation serves as an introduction to the conference's focus on wealth transfer and planning. It includes an overview of the issues and considerations involved in estate planning, as well as advice on navigating fiduciary documents; sophisticated charitable giving strategies; effective grantor trust planning; and more.
- **Components of the Conference:** The conference covers a wide range of topics, including significant, curious, or unusual cases in estate planning, considerations when selling a family business, and advice on navigating fiduciary documents.
- **Networking Opportunities:** Participants will have the opportunity to catch up with colleagues at the course picnic and relax under the stars, as well as engage in group discussion and interact with faculty at the evening reception.
- **Practical Applications:** The conference will provide practical applications and real-world examples to ensure that attendees can apply what they learn.
- **CPE Credit Hours:** The conference offers 3.5 hours of Ethics and 35.00 CPE Credit Hours, including 3 hours of Ethics.

**Pricing Details**

**Standard Rate:** $1,699 | **Webcast Rate:** $1,399

**Savings Options**
- **Save 30%**
- **Group Rate:** $1,019* for each additional registrant, $1,699 for first registrant

**Discounts**
- Discounts are valid on new registrations for in-person course only; may not be combined with other discounts.
- ALI CLE makes a limited number of full and partial scholarships available; for more information visit www.ali-cle.org/CZ020.

For more information or to register, go to www.ali-cle.org/CZ020.
Representing Estate and Trust Beneficiaries and Fiduciaries 2018

JULY 19 - 20, 2018
CHICAGO

Get an in-depth look at the divergent interests of trust and estate beneficiaries and fiduciaries at this one-of-a-kind program.

Hear the perspectives of a broad-based national faculty and gain practical strategies for representing the colliding interests of lawyers and settlors, beneficiaries and fiduciaries, and even among beneficiaries—an area often missed in traditional estate planning and trust administration programs. Interactive panels and themed sessions devote equal parts to the latest tax, litigation, liability, and fiduciary developments.

To learn more or to register, go to www.ali-cle.org/CA001

TAKE ADVANTAGE OF UNIQUE NETWORKING AND LEARNING OPPORTUNITIES!

Sunday afternoon:
The optional session on Sunday is designed for practitioners who have a limited background in estate planning, offering in-person attendees a concise review of the essentials of federal, gift, and generation-skipping taxes.

Monday evening:
Meet and network with fellow registrants and faculty at an evening reception in the Boerner Plaza Atrium.

Tuesday evening:
Join faculty and other registrants at a picnic dinner on campus.

Wednesday evening:
Take in a stirring performance by the Wisconsin Chamber Orchestra at a Concert on the Square.

Anytime:
Enjoy the university’s outdoor spaces and facilities, with easy access to the college town of Madison for restaurants, shops, parks, and entertainment.