

26TH TULANE ESTATE PLANNING INSTITUTE

October 27, 2017

Westin Canal Place Hotel, New Orleans, LA

- 8:30 - 9:45 **Recent Developments in Successions and Donations**
Joseph W. Mengis, Perry, Balhoff, Mengis & Burns LLC, Baton Rouge, LA
- 9:45 - 10:45 **Estate Tax Repeal and Recent Developments in Estate and Gift Tax****
Rebecca M. Hinton, Phelps Dunbar LLP, Baton Rouge, LA
- 10:45 - 11:00 **BREAK**
- 11:00 - 12:00 **Cutting Edge Charitable Gift and Tax Planning****
Deborah G. Marx, Tulane University, New Orleans, LA
- 12:00 - 1:00 **LUNCH (included)**
- 1:00 - 2:00 **End of Life Decisions: Living Wills, Healthcare Powers of Attorney and Other Issues**
Laure E. Fine, Lehmann, Norman & Marcus LC
- 2:00 - 3:00 **Transfer on Death Accounts in Louisiana: Tax and Other Hidden Dangers****
Katherine Conklin, McGlinchey Stafford PLLC, New Orleans, LA
- 3:00 - 3:15 **BREAK**
- 3:15 - 4:15 **Tax and Professionalism in Estate Planning****
Bruce Spizer, Bruce Spizer, A Professional Law Corporation, New Orleans, LA

This program is approved for Estate Planning Specialization CLE credit.

****Sessions are approved for both Tax and Estate Planning Specialization Credit**

GENERAL INFORMATION

Date: October 27, 2017
Registration: 8:00 a.m.
Time: 8:30 a.m. – 4:15 p.m.
Location: Westin Canal Place Hotel, 100 Iberville Street, New Orleans, LA 70130
Credit: 6.25 hours for Louisiana and other 60-minute states (includes 1.0 hour of professionalism);
7.5 hours (includes 1.2 hour professionalism) for 50-minute states
Fee: \$298 through October 20; \$340 after October 20

REGISTRATION

- **On-line registration** <http://www.law.tulane.edu/cle>
- \$298 through October 20 (\$340 after October 20)
A government/not-for-profit/academic rate of \$175 through October 20 (\$200 after October 20) is available for full-time employees of a government or not-for-profit agency or academic institution
- Fee includes course materials, refreshment breaks and lunch
- Confirmation will be sent upon receipt of registration
- We cannot guarantee lunch if it is not checked upon registration
- Additional course materials are available for \$75. Materials will be shipped after the program is completed
- We accept checks, cash, VISA and MasterCard only
- If you require special services or have special needs, contact the CLE office

CANCELLATION AND REFUND

- We offer a full refund, less a \$50 cancellation fee, through **Friday, October 20**
- We ask that all cancellations be made in writing via e-mail to mcle@tulane.edu by October 20

CLE CREDIT

- This program is recognized in Louisiana, a mandatory 60-minute CLE state
- Attorneys licensed in 60-minute states will receive a maximum of 6.25 CLE hours
- Attorneys licensed in 50-minute states will receive a maximum of 7.5 CLE hours
- 1.0/1.2 hour of Ethics is included
- Specific sessions are approved for both tax and estate planning specialization CLE credit in Louisiana

PROGRAM LOCATION AND ACCOMMODATIONS

- Westin Canal Place Hotel, 100 Iberville Street, New Orleans, LA 70130
- You are responsible for your own hotel reservations. For reservations at the Westin, call 1.888.627.8180 or 504.566.7006

ABOUT TULANE CLE

- Tulane CLE is committed to offering distinctive learning opportunities while providing superior service and satisfaction
- For assistance call 504.865.5900, email mcle@tulane.edu or visit www.law.tulane.edu/cle

A NOTE OF APPRECIATION

Our speakers for this Institute are volunteers. Without their generous contributions of time, thought, planning and energy, Tulane would not be able to bring you superior learning opportunities. We thank them for their gifts.

26TH TULANE ESTATE PLANNING INSTITUTE

October 27, 2017
Westin Canal Place Hotel, New Orleans, LA

REGISTRATION FORM

\$298 (THROUGH OCTOBER 20) \$340 (AFTER OCTOBER 20)

I WILL ATTEND LUNCH (INCLUDED)

MR./MS. _____ NAME ON BADGE: _____

FIRM: _____

ADDRESS: _____

CITY: _____ STATE: _____ ZIP: _____

PHONE: () _____ - _____ E-MAIL: _____

BAR MEMBERSHIP STATE(S) AND BAR NUMBER(S):

MAIL REGISTRATION FORM AND CHECK PAYABLE TO:

*TULANE CLE
200 BROADWAY, SUITE 203
NEW ORLEANS, LA 70118*

ALL REGISTRATIONS PAID VIA CREDIT CARD MUST REGISTER USING THE SECURE ON-LINE REGISTRATION SITE: <http://www.law.tulane.edu/tlsLifeAfterLS/estate.aspx>

TULANE ESTATE PLANNING INSTITUTE

In 2002, Tulane Law School established the Tulane Estate Planning Institute to provide a permanent forum for the study of estate planning laws in Louisiana, the United States and other jurisdictions. As part of the Institute's goal to provide a setting for the discussion of legal and tax issues pertinent to estate planning, the Institute sponsors Tulane Law School's annual estate planning continuing legal education program, currently in its 26th year. This annual program, now known as the Estate Planning Institute, recognizes Tulane Law School's renewed commitment to providing the highest quality instruction on the most important and topical issues facing estate planning professionals.

Tulane Law School wishes to acknowledge the members of the Tulane Estate Planning Institute Advisory Board:

Kenneth A. Weiss, Esq., *Chair*, McGlinchey Stafford, PLLC, New Orleans, LA

Marguerite L. Adams, Esq., Liskow & Lewis, New Orleans, LA

Jane E. Armstrong, Esq., Phelps Dunbar, LLP, New Orleans, LA

Laura Junge Carman, Esq., Attorney at Law, New Orleans, LA

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Mark S. Stein, Esq., Lowe, Stein, Hoffman, Allweiss & Hauver, LLP, New Orleans, LA

Lizbeth A. Turner, Esq., Tulane University Planned Gifts, New Orleans, LA