8:30 – 9:45 a.m.  **Recent Developments in Successions and Donations**  
*Joseph W. Mengis*, Perry, Atkinson, Balhoff, Mengis & Burns, LLC, Baton Rouge, LA

9:45 – 10:45 a.m.  **Shifting Principal Interests in Louisiana Trusts and Other Developments**  
*Prof. Ron Scalise*, Tulane Law School, New Orleans, LA

10:45 – 11:00 a.m.  Break

11:00 – 12:00 p.m.  **LLCs and Estate Planning: Using Operating Agreements to Maximize Planning Opportunities**  
*Mark S. Stein*, Lowe, Stein, Hoffman, Allweiss & Hauver, LLP, New Orleans, LA

Noon – 1:00 p.m.  Lunch (included)

1:00 – 2:00 p.m.  **Planning for and Representing Clients with Diminished Capacity**  
*Carole Cukell Neff*, Sessions, Fishman, Nathan & Israel, LLC, New Orleans, LA

2:00 – 3:00 p.m.  **Estate Planning for the “Merely Wealthy” Client Under New Tax Law**  
*Erin Kriksciun*, Stone Pigman Walther Wittmann, LLC, New Orleans, LA

3:00 – 3:15 p.m.  Break

3:15 – 4:15 p.m.  **Ethics for Estate Planners**  
*Bruce Spizer*, Bruce Spizer, A Professional Law Corporation, New Orleans, LA
GENERAL INFORMATION
Date: November 18, 2016
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) and 7.5 hours (1.2 hour professionalism) for 50-minute states
Fee: $298 through November 11; $340 after November 11

REGISTRATION
• On-line registration http://www.law.tulane.edu/cle
• $298 through November 11 ($340 after November 11)
A government/not-for-profit/academic rate of $175 through November 11 ($200 after November 11) is available for full-time employees of a government or not-for-profit agency or academic institution
• Fee includes: course material, 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 material is available for $75. Material 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, November 11
• We ask that all cancellations be made in writing via fax (504.866.1583) or e-mail to mcle@tulane.edu by November 11

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
• Applied 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.
REGISTRATION FORM

☐ $298 (through November 11)  ☐ $340 (after November 11)

☐ 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: www.law.tulane.edu/cle
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 25th 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
David F. Edwards, Esq., Jones Walker LLP, New Orleans, LA
Honorable F. A. Little, Jr., Chief Judge, Coushatta Tribal Court, Elton, LA and former United States District Court Judge, Western District of Louisiana, Alexandria, LA
Edward F. Martin, Esq., Jones Walker LLP, New Orleans, LA (retired)
Joel A. Mendler, Esq., Baldwin, Haspel Burke & Meyer, LLC, New Orleans, LA
Max Nathan, Jr., Esq., Sessions, Fishman, Nathan & Israel, LLP, New Orleans, LA
Carole C. Neff, Esq., Sessions, Fishman, Nathan & Israel, LLP, New Orleans, LA
Laura Walker Plunkett, Esq., Stone, Pigman, Walther, Wittman, LLP, New Orleans, LA
Brianne S. Rome, Esq.
Professor Sally Richardson, Tulane University Law School, New Orleans, LA
Professor Ronald J. Scalise, Jr., Tulane University Law School, New Orleans, LA
David L. Sigler, Esq., David L. Sigler & Associates, LLC, Lake Charles, LA
David Bruce Spizer, Esq., Bruce Spizer, APLC, New Orleans, LA
Mark S. Stein, Esq., Lowe, Stein, Hoffman, Allweiss & Hauver, LLP, New Orleans, LA
Lizbeth A. Turner, Esq., Tulane University Planned Gifts, New Orleans, LA