TennBarU
CLE FOR TENNESSEE

Estate Planning Forum 2014
February 28, 2014 – Nashville, TN

Program Description: Join the TBA's Estate Planning Section at its annual Estate Planning Forum, where you will be able to learn from Tennessee's top attorneys on estate planning techniques and probate considerations, as well as gain insight into the new legislation and case law rulings affecting these areas. This information-packed, full-day program will provide 6 CLE hours, including 1 hour of ethics credit. ***Breakfast & Lunch will also be provided***.

Program Producer: Donald Farinato, *Holbrook Peterson Smith PLLC*

Agenda   Credit hours: 5 general, 1 dual

8:00 – 8:20 a.m.	**Registration/Breakfast/Welcome** (***Breakfast Sponsored by: Independence Trust***)
8:30 – 9:30 a.m. **[Tab 1]**	**The New Tennessee Conservatorship Laws: Correcting the Myths** *Tennessee's conservatorship statutes underwent a major overhaul effective July 1, 2013 to settle a number of areas of confusion. In this session, the following questions will be addressed: How do you get help in a hurry for a ward in distress? What is the proper role of the Guardian ad Litem? What should your petition contain? Who will pay for the proceedings?* **Kelly Frere**, *Guyton & Frere*
9:30- 10:30 a.m. **[Tab 2]**	**John Wayne Never had to Deal with This: Advice for Estate Planners Under the Gun** *In this segment we will discuss: What is gun trust? Benefits of using the gun trust? Why not use a business entity? And general warnings in drafting or using gun trusts* **Anne McKinney,** *Anne M. McKinney, P.C.* **Victoria Tillman,** *Anne M. McKinney, P.C.*
10:30 – 11:00 a.m. **[Tab 3]**	**Planning for Portability** *Portability is here to stay! No more planning necessary, right? How portability is changing estate planning and how we advise our clients.* **Stacy Roettger,** *The Trust Co. of Knoxville*

11:00 – 11:15 a.m.	**BREAK**
11:15 – 11:45 a.m. **[Tab 4]**	**The Supreme Court's DOMA Decision:** Estate **Planning For Same-Sex Couples In Tennessee** *This presentation analyzes the estate planning and tax impact Of the Windsor decision.* **David Parsons,** *Baker Campbell & Parsons*
11:45 – 12:45 p.m.	LUNCH (***lunch will be provided***)
12:45 – 1:15 p.m. **[Tab 5]**	**In re Huber: To TIST Or Not To TIST?** *This presentation discusses a recent bankruptcy court decision involving an Alaska asset protection trust (DAPT) and its implications for utilizing the Tennessee Investment Services Trust (TIST) and alternatives thereto.* **David Parsons,** *Baker Campbell & Parsons*
1:15 – 1:45 p.m. **[Tab 6]**	**Spray-on "Tanner": The Tennessee Supreme Court's *Tanner* decision (295 S.W.3d 610 (2009)) and its progeny can still "burn" the unsuspecting probate practitioner** *This presentation will provide a synopsis of the appellate rulings regarding TennCare claims against decedent's estates and strategies for resolving TennCare claims.* **Matthew Thornton,** *Bourland, Heflin, Alvarez, Minor & Matthews, PLC*
1:45 – 2:45 p.m. **[Tab 7]**	**Ethics for Estate Planning and Estate Administr*ation*** *Attorneys implementing estate plans and administering those plans often face numerous ethical issues, such as joint representation, client confidentiality, client competence, and billing inquiries. This ethics presentation will explore many of the difficult to resolve dilemmas faced by trusts and estates attorneys.* **Steve McDaniel,** *Wyatt Tarrant & Combs PLLC*
2:45 – 3:00 p.m.	**BREAK**
3:00 – 4:00 p.m. **[Tab 8]**	**Legislative Update** *A summary of legislation adopted by and being considered by the Tennessee Legislature; legislation adopted by Congress and decisions made by various Courts and agencies affecting estate planning, estate administration and tax matters.* **Albert Secor**, *CapitalMark Bank & Trust*