8th Annual Probate and Estate Planning Conference

For Alabama Attorneys

THURSDAY- FRIDAY, MAY 10-11 | BIRMINGHAM

EARN CLE CREDIT

12 hours of CLE
(11 hours of general and 1 hours of DUAL)

The Probate & Estate Planning Conference for Alabama Attorneys packs two days with some of the state's top estate planning and probate practitioners delivering critical guidance on the hottest topics and some of the most complex issues you'll face. Your distinguished faculty will explain the very latest developments and strategies, including:

- Use of special needs trusts
- Duties of the personal representative
- Understanding grantor trusts—2018 tax rates and considerations
- Medicaid planning—the pros and cons of transferring assets
- What to do before and after your client's death
- Appointments of guardian and/or conservator
- Ins and outs of a will contest
- Use of LLCs in asset protection and estate planning
- Ethics rules to consider in probate and estate planning

YOUR DISTINGUISHED FACULTY

Nancy Williams Ball
Cabaniss, Johnston, Gardner, Dumas & O'Neal LLP, Birmingham

Melanie Bradford
Bradford & Holliman, LLC, Scottsboro

Herbert E. (Chip) Browder
Browder & Welborn, LLC, Tuscaloosa

Jack Carney
Carney Dye, LLC, Birmingham

John Craft
Faulkner University, Jones School of Law, Montgomery

Clayton Davis
Davis & Associates, Montgomery

Shannon Dye
Carney Dye, LLC, Birmingham

Judge Sherri Friday
Jefferson County Probate Court, Birmingham

Connie Glass
The Elder Law Firm of Connie Glass, P.C., Huntsville

Heather Locklar
Warren Averett, Birmingham

James P. (Jim) Naftel
Maynard Cooper & Gale, Birmingham

Sidney C. Summey
White Arnold & Dowd, P.C., Birmingham

John Watts
Watts & Herring, LLC, Birmingham

David B. Welborn
Browder & Welborn, LLC, Tuscaloosa

Peter Wright
Sirote & Permutt, P.C., Birmingham

Alabama Law Weekly

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Agenda

FOR FULL AGENDA DETAILS, VISIT MLEESMITH.COM/APEC

THURSDAY, MAY 10

How to Use a LLC in Alabama to Protect Estate Assets
8:30 A.M. TO 9:30 A.M.

A LLC and its series protects client assets for the benefit of the members from future, unanticipated, contingencies and risks (such as litigation involving individual family members) that could jeopardize ownership if held individually. In this session, learn how to avoid the negative implications, choose single vs multi-member LLC, use series LLC in estate planning, and manage liability enforcement.

Choosing a Personal Representative: Key Characteristics for Helping Clients Decide
9:30 A.M. TO 10:30 A.M.

Using experts in a medical malpractice case can present a host of ethical pitfalls for Tennessee attorneys. Earn DUAL CLE as you learn how to avoid them!

MORNING BREAK 10:30 A.M. TO 10:45 A.M.

Ethical Considerations in Estate Planning
10:45 A.M. TO 11:45 P.M.

How can delegation of estate management duties get you into ethical trouble? When do you have fiduciary responsibilities? Earn valuable ethics CLE credit as you learn how to avoid pitfalls. You'll get valuable guidance on handling clients with diminishing mental capacity, acting as a fiduciary, providing estate status updates for clients, practicing before the IRS, billable/non-billable hour and retainer agreements, and preventing unauthorized practice of law by staff.

EARN ETHICS CREDIT

LUNCH 11:45 A.M. TO 1:00 P.M. (ON YOUR OWN)

VA Pension: How to Use a Little-Known Benefit to Aid Your Clients
1:00 P.M. to 2:00 P.M.

Is your client a veteran or the surviving spouse of a veteran? If so, you should explore whether that client could benefit from a VA pension. This session covers qualification requirements, the federal prohibition on charging fees, and how this law and Medicaid work together.

Estate Planning to Avoid Medicaid Recovery
2:00 P.M. to 3:00 P.M.

Reducing assets to meet Medicaid eligibility is often a client's only recourse. Learn how to answer two of the most common questions an elder law attorney will hear —"How can I give away my assets to protect them from the nursing home?" and "What should I do with my home?" We'll cover asset transfer pros and cons and estate planning for non-nursing home spouse.

AFTERNOON BREAK 3:00 P.M. TO 3:15 P.M

Probate Court Tactics: Win the Will Contest and Other Battles
3:15 P.M. to 4:15 P.M.

Where there's a will, there's often a war. As an Alabama attorney, are you fully armed for a probate fight? Procedural rules in probate litigation can be confusing, so we'll help you become more comfortable handling a settlement or contesting a will. In this session, you'll learn best practices when litigating in probate court.

FRIDAY, MAY 11

Income Tax Issues in Estate Planning
8:30 A.M. TO 9:30 A.M.

Clients expect you to incorporate the latest tax laws and emerging opportunities into the estate planning counsel you provide. Learn how changes to IRS code may alter your advice, and how to leverage various forms of trusts to minimize tax liabilities. We'll cover basis issues and obtaining step up in basis, grantor trust status for irrevocable trusts, avoiding compressed tax brackets for trusts, and post-death tax elections.

Panel Discussion: Hot Topics in Probate & Estate Planning for 2018 and Beyond
9:30 A.M. TO 10:30 A.M.

Join our seasoned panel for a fast-paced review of the biggest changes in the practice of Alabama probate and estate planning, with use-them-now tips for saving time, working efficiently, and avoiding expensive errors. We'll cover digital assets, drafting wills, estate administration, probating a will, small estates, guardian *ad litem*, conservatorships, and more!

MORNING BREAK 10:30 A.M. TO 10:45 A.M.

How to Avoid Guardianships and Conservatorships
10:45 A.M. TO 11:45 A.M.

Because guardianship and even conservatorships result in loss of personal freedom to act on one's own behalf, it is important to understand how your client can avoid these appointments. Learn how to use 5 measures to help those who wish to resist becoming subject to guardianship or conservatorship.

LUNCH 11:45 A.M. TO 1:00 P.M. (ON YOUR OWN)

Medicaid Estate Recovery: How to Help Shield Client Assets

1:00 P.M. TO 2:00 P.M.

Medicaid enrollment is expected to increase by 9 million next year, and the government is aggressively pursuing recovery from estates. Arm yourself with essential information and strategies to protect your clients' assets from Medicaid liens and Medicaid estate recovery.

Special Needs Trusts in Alabama: Avoid Malpractice and Be a Hero to Your Clients

2:00 P.M. to 3:00 P.M.

A special needs trust is a very valuable resource your Alabama clients should consider when dealing with the long-term needs of an individual with a disability, particularly if the individual receives government benefits. It can also be used in divorces, to hold a disabled individual's share of the property division, and to hold child support payments for a child with a disability. They are also useful in a variety of other situations. Learn when and how to use them to meet critical client needs and expectations.

AFTERNOON BREAK 3:00 P.M. TO 3:15 P.M.

Estate Planning in Alabama: Use of Grantor Trusts

3:15 P.M. TO 4:15 P.M.

Are you up to date with grantor trusts in Alabama? They can be of great use to your clients in estate planning, but only if you know the ins and outs of how they work, and the tax implications for both the grantor and the beneficiaries. In this session, we'll look at how to set up and manage a grantor trust as an estate planning vehicle.

WHEN AND WHERE

Thursday and Friday

May 10-11, 2018

Embassy Suites Birmingham - Hoover

2960 John Hawkins Pkwy

Birmingham, Alabama

For directions, visit: *mleesmith.com/APEC*

Registration begins at 8:00 a.m. The conference begins at 8:30 a.m. and concludes at 4:15 p.m. each day. There will be morning and afternoon breaks and independent lunch breaks.

CLE CREDIT

12 hours CLE

(11 hours of general and 1 hour of ethics)

CONFERENCE FEES

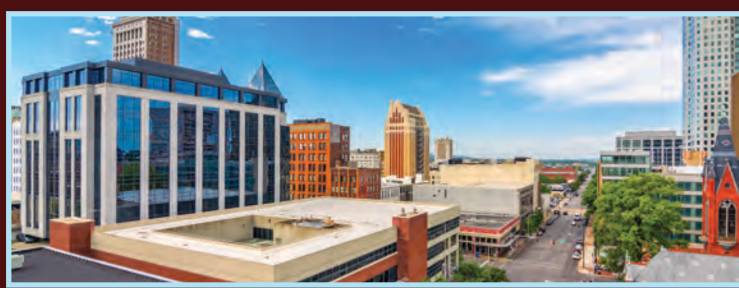
$497 for entire program

($70 off for additional attendees from same firm)

$347 for one day only

$247 for materials only

$50 early bird discount until March 31.



Learn more and register at www.mleesmith.com/APEC

YOUR DISTINGUISHED FACULTY

Nancy Williams Ball is a partner in Cabaniss, Johnston, Gardner, Dumas & O'Neal LLP's Birmingham office where she practices in the areas of estates and trusts, including estate planning and estate administration, taxation, real estate and corporate law. Mrs. Ball is a member of the Estate Planning Council of Birmingham, Inc. and the Alabama Planned Giving Council.

Melanie B. Bradford is a partner with Bradford & Holliman, LLC. Her practice focuses on estate planning, long term care planning, asset protection, Medicaid planning & appeals , retirement stretch-out trusts, special needs trusts, estate and gift tax planning, probate matters, and business law. She is Executive Director for Alabama Family Trust, a nonprofit 501(c)(3) special needs trust serving children and adults with disabilities. She served as President of the Elder Law Section of the Alabama State Bar in 2010-11.

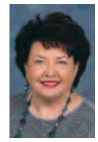
Herbert E. (Chip) Browder, with Browder & Welborn, LLC in Tuscaloosa, has been providing legal services in Tuscaloosa and throughout the state of Alabama for nearly 25 years. He has been an annual lecturer on Estates and Trusts at the University of Alabama Law School's Annual "Bridge the Gap" and "Will Drafting" seminars for young lawyers in the state, and he is a frequent seminar speaker.

Jack Carney, with Carney Dye, LLC in Birmingham, focuses on wills, estates and special needs planning. Prior to opening his law practice, he practiced for several years in a large law firm's estate planning group. Mr. Carney is a member of the Alabama State Bar and the Birmingham Bar Association. Mr. Carney received a chartered life underwriter (CLU) professional designation.

John Craft is a professor at Faulkner University - Jones School of Law. He teaches and supervises the Elder Law Clinic where his students provide pro bono legal services for Montgomery area seniors: preparing basic wills, living wills, and powers of attorney; providing representation during guardianship and conservatorship proceedings; and, assisting with nursing home Medicaid applications. Professor Craft is past Chair of the Elder Law Section of the Alabama State Bar.

Clayton Davis is an attorney with Davis & Associates, with offices in Dothan, Mobile, and Montgomery. In addition to his probate, elder law, and Social Security disability practice, his firm has contracts to manage the Medicare fraud program and to provide health insurance counseling to persons of all ages who have Medicare and to provide legal assistance to persons over age sixty in most of southern Alabama. He is the president of the Board of Directors of the Alabama Family Trust.

Judge Sherri Coleman Friday is Jefferson County Probate Judge for Place 2 in Birmingham. Judge Friday practiced law in Jefferson County, Alabama, for 18 years prior to her election as Probate Judge in November, 2006, and her re-election in 2012. Judge Friday hears cases involving adult involuntary commitments, adoptions, probate of wills, guardianships and conservatorships, estate and conservator settlements, condemnations, claims against estates, legitimations, name changes and petitions for sale of real estate.



Connie Glass founded the Elder Law Firm of Connie Glass, P. C. in Huntsville. She served as the attorney for the TARCOG Area Agency on Aging for over ten years and was on the staff of the University of Alabama Law School. Ms. Glass is certified as an Elder Law Attorney by the National Elder Law Foundation, and is one of only three certified Elder Law Attorneys in Alabama.

Heather N. Locklar joined Warren Averett in Birmingham in 2016 and is an Estate Planner in the Firm's Tax Division. She is a member of the American Bar Association, the Birmingham Bar Association, the Alabama State Bar, the Birmingham Estate Planning Council, and the 2017 Future Leaders Forum for the Birmingham Bar Association

James P. (Jim) Naftel is a shareholder at Maynard Cooper & Gale in Birmingham. He focuses his practice in the areas of estate planning (advice, planning, drafting and implementation of wills and trusts); probate (including estate administration, guardianships, and conservatorships); estate administration; and estate litigation.

Sidney C. Summey was the founder of the firm of Summey & Hennecy, LLC in Birmingham and has over 40 years of experience in the legal profession. His practice involves guardianships and conservatorships, decedent's estates, trusts, the representation of conservators of the estates of minors and incapacitated adults who have received personal injury awards, special needs trusts, elder law and litigation related to estates, trusts and conservatorships. Since February, 2008, he has served as the General County Conservator and Guardian for Jefferson County.

John Watts, of Watts & Herring, LLC in Birmingham, helps seniors to qualify for Alabama Medicaid as well as VA benefits to help with long-term care. He also has extensive experience in litigating and trying personal injury and wrongful death cases.

David B. Welborn earned his Finance, M.B.A., and law degrees from the University of Alabama and practiced with a large law firm in Atlanta before he and his wife returned home to Alabama. David's knowledge and experience in finance, real estate, and business is a great asset in assisting clients with estate and business planning.

Peter Wright, a shareholder with Sirote & Permutt, P.C. in Birmingham, focuses his practice on trust and estate litigation matters, with particular emphasis on will contests, estate and trust administration matters, joint account or joint ownership of property disputes, power of attorney litigation, and general representation of fiduciaries (including trust institutions or corporate trustees) and beneficiaries of estates and trusts. He routinely handles adversarial and non-adversarial guardianship and conservatorship matters, and has been appointed to mediate various trust and estate administration disputes.

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Get up-to-date information on the latest and most significant developments affecting your clients and practice. Reserve your seat at the 8th Annual **Probate and Estate Planning Conference Alabama Attorneys.** Your registration includes the two-day conference, pages of valuable course materials, morning and afternoon snacks, and up to 12 hours of CLE credit , including 1 hours of ethics.

Guarantee: If you are not completely satisfied, we wil refund 100% of your registration fee-no questions asked.

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10 reasons to attend the Probate & Estate Planning Conference for Alabama Attorneys:

1. **Outstanding faculty.** You'll hear from leading attorneys in estate planning and probate practice in Alabama.
2. **Practical information.** You'll get practical information you can put to use immediately in your practice.
3. **Tips on will drafting.** You'll receive practical pointers to use when drafting wills, including sample forms.
4. **Use of trusts.** You'll get tips for drafting flexible trusts as well as what to consider when using grantor trusts.
5. **Elder law.** You'll get the ins and outs of conservatorship proceedings.
6. **Medicaid.** Learn the latest Medicaid rules and the pros and cons of transferring assets.
7. **Probate litigation.** Learn about common issues that arise in will contests.
8. **Timely topics.** You'll get information on digital asset planning, using LLCs as an estate planning tool, and the appropriate use of special needs trusts.
9. **Ethical Considerations.** You'll learn what ethical rules to keep in mind when representing estate clients, beneficiaries, and trustees.
10. **CLE.** You can earn all of your annual CLE credit, including three dual hours.

Here's what your colleagues said about last year's **Annual Probate & Estate Planning Conference for Alabama Attorneys**

"The speakers were very knowledgeable, and the materials provided were very thorough."

"I liked being able to get in–depth information that is usually not possible in a one-day CLE event."

"The conference was very well organized and stayed on topic and schedule."

"The conference was both informative and useful."

"I liked the interaction with the speakers."

When: May 10-11, 2018
Where: Birmingham

For registration assistance or to register additional attendees, call 800-727-5257 or visit us online at *MLEESMITH.COM/APEC*