YOUR DISTINGUISHED FACULTY

Rebecca Blair, The Blair Law Firm, Brentwood
Alan L. Cates, Husch Blackwell LLP, Chattanooga
Michael Crowder, Kennerley, Montgomery, & Finley, P.C., Knoxville
Harlan Dodson, Dodson, Parker, Behm & Capparella P.C., Nashville
Elizabeth B. Hickman, Pendleton Square Trust Company, Nashville
Glen Kyle, Monica Franklin & Associates, LLC, Knoxville
Patrick B. Mason, Mason Zoccola Law Firm, PLLC, Memphis
Steve McDaniel, Williams McDaniel, Memphis
Sara E. McManus, Baker, Donelson, Bearman, Caldwell & Berkowitz, PC, Chattanooga
Hunter R. Mobley, Howard Mobley Hayes & Gontarek, PLLC, Nashville
Jeff Mobley, Howard Mobley Hayes & Gontarek, PLLC, Nashville
Julie Travis Moss, The Blair Law Firm, Brentwood
Michelle Poss, Law Office of A. Michelle Poss, Nashville
Tim Takacs, Takacs McGinnis Elder Care Law, PLLC, Hendersonville
Alexander Taylor, Kennerley, Montgomery, & Finley, P.C., Knoxville
Matthew Thornton, Bourland, Heflin, Alvarez, Minor & Matthews PLC, Memphis

The **Probate & Estate Planning Conference for Tennessee 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 on:

- Advanced estate planning tips
- Getting elder care paid for
- Will drafting "dos and don'ts" and "must-have" provisions
- Essentials for implementing and handling conservatorships and guardianships
- Estate planning with trusts
- Tips for practicing in probate court
- Living vs. Testamentary Trusts for tax purposes
- Tips, techniques, and things to watch for in probate and estate planning
- Dealing with estate, income, and generation-skipping transfer taxes
- Tips for drafting estate planning documents
- When and how to set up special needs trusts and/or charitable trusts
- Advance care planning tips
- Understanding issues that arise in small estates
- Bridging the gap between estate administration attorneys and estate planners
- Trusts, estate planning, and probate update
- Ethical issues facing trust and estate planning attorneys and ethical issues that arise in elder law
- Sample forms and checklists

WHEN: December 13 & 14, 2018
WHERE: Nashville, TN

To Register: Visit MLeeSmith.com/tn-probate
Call 800-274-6774
Email EventSales@BLR.com

Tennessee Attorneys Memo

10th Annual Probate & Estate Planning Conference for Tennessee

NOVEMBER 13 & 14 | NASHVILLE

EARN CLE CREDIT

15 hours of CLE
(12 hours of general and 3 hours of dual)

THIS TWO-DAY SEMINAR OFFERS AN INSIDER'S PERSPECTIVE ON THE MOST SIGNIFICANT RECENT DEVELOPMENTS IN TENNESSEE PROBATE AND ESTATE PLANNING LAW. FULFILL YOUR ANNUAL CLE REQUIREMENT AT ONE EVENT.

M. Lee Smith® PUBLISHERS a division of BLR

To Register: Visit www.mleesmith.com/tn-probate, Call 800-274-6774, or Email EventSales@BLR.com.

M. Lee Smith® PUBLISHERS a division of BLR

PRSRT STD
US Postage
PAID
Nashville, TN
Permit 361

REGISTRATION IS EASY!

Web: mleesmith.com/tn-probate
Phone: 800-727-5257
Email: eventsales@blr.com

Use exclusive code **TNPROBATE50** for an additional $50 off your registration!

Get up-to-date information on the latest and most significant developments affecting your clients and practice. Reserve your seat at the **10th Annual Probate & Estate Planning Conference for Tennessee Attorneys.** Your registration includes the two-day conference, pages of valuable course materials, morning and afternoon snacks, and up to 15 hours of CLE credit, including 3 hours of dual.

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

Cancellation Policy

- A $50 fee applies to ALL conference cancellations.
- Registrants are responsible for the entire program fee for a cancellation made after 5:00 p.m three weeks prior to the event (whether or not you attend the program or fail to cancel).
- An alternate may attend in place of the original registrant.

10th Annual Probate & Estate Planning Conference for Tennessee Attorneys

- Use of various trusts as estate planning tools
- Tips for drafting wills in 2019
- Getting elder care paid for
- Duties and liabilities of personal representatives
- Efficient estate administration
- Irrevocable trusts in VA benefits planning
- Tax consequences of a beneficiary distribution
- Probate litigation case law and legislative update
- Ethical issues facing trust and estate planning attorneys
- Planning for a client's long-term care
- Alternatives to full probate administration
- Dealing with tax issues when administering an estate
- Ethical issues that arise in elder care
- Using charitable trusts effectively
- Bridging the gap between estate administration attorneys and estate planners
- What to look for in reviewing existing estate plans
- Tips for drafting estate planning documents
- Understanding issues that arise in small estates

Agenda

FOR FULL AGENDA DETAILS, VISIT *MLEESMITH.COM/TN-PROBATE*

THURSDAY, DECEMBER 13

Planning Opportunities & Challenges in 2019 and Beyond
8:00 a.m. to 9:00 a.m.
Presented by: Harlan Dodson, Dodson, Parker, Behm & Capparella, PC

Estate Planning with Trusts in Tennessee
9:00 a.m. to 10:30 a.m.
Presented by: Jeff Mobley & Hunter Mobley, Howard Mobley Hayes & Gontarek, PLLC

Morning Break
10:30 a.m. to 10:45 a.m.

How Care Gets Paid for in Today's Elder Care Continuum
10:45 a.m. to 11:45 a.m.
Presented by: Timothy L. Takacs, Takacs McGinnis Elder Care Law, PLLC

Lunch *(included with registration)*
11:45 a.m. to 12:45 p.m.

Understanding the Role of the Personal Representative in Probate
12:45 p.m. to 1:45 p.m.
Presented by: Alan L. Cates, Husch Blackwell LLP

Estate Administration – Best practices, tips and pitfalls to avoid
1:45 p.m. to 2:45 p.m.
Presented by: Elizabeth B. Hickman, Pendleton Square Trust Company

Afternoon break
2:45 p.m. to 3:00 p.m.

Qualifying for TennCare and VA Benefits: Use of Irrevocable Trusts
3:00 p.m. to 4:00 p.m.
Presented by: Alexander M. Taylor & Michael Crowder, Kennerley, Montgomery, & Finley, P.C.

Tax Consequences of Trusts
4:00 p.m. to 5:00 p.m.
Presented by: Patrick B. Mason, Mason Zoccola Law Firm, PLLC

FRIDAY, DECEMBER 14

2018 Probate Litigation Case Law and Legislative Update
8:00 a.m. to 9:00 a.m.
Presented by: Rebecca Blair, The Blair Law Firm

Ethics in Estate Planning and Estate Administration
9:00 a.m. to 10:30 a.m.
Presented by: Steve McDaniel, Williams McDaniel

Morning Break
10:30 a.m. to 10:45 a.m.

Long-Term Care Advance Planning
10:45 a.m. to 11:45 a.m.
Presented by: Glen A. Kyle, Monica Franklin & Associates Elder Law

Lunch *(included with registration)*
11:45 a.m. to 12:45 p.m.

Elective Share, Homestead, and Alternatives to Full Probate
12:45 p.m. to 1:45 p.m.
Presented by: Matthew Thornton, Bourland, Heflin, Alvarez, Minor & Matthews PLC

Ethics in Elder Care
1:45 p.m. to 3:15 p.m.
Presented by: Michelle Poss, Law Office of A. Michelle Poss

Afternoon Break
3:15 p.m. to 3:30 p.m.

Charitable Trusts
3:30 p.m. to 4:15 p.m.
Presented by: Sara McManus, Baker, Donelson, Bearman, Caldwell & Berkowitz, PC

Twenty-Five Tips & Techniques from the Other Side – Estate Planning from an Estate Administration Perspective
4:15 p.m. to 5:00 p.m.
Presented by: Julie Travis Moss, The Blair Law Firm

WHEN: December 13 & 14, 2018

WHERE: Nashville School of Law
4013 Armory Oaks Drive
Nashville, Tennessee 37204
Free parking & Free wi-fi

INVESTMENT:
$497 for entire program
($70 off for additional attendees from same firm),
$347 for one day only, and $247 for materials
$50 early bird discount until November 2

CLE CREDIT:
15 hours of CLE
(12 hours of GENERAL and 3 hour of DUAL)

SPONSORSHIP:
To sponsor this event, please contact Olivia Al-Sadi
at OAl-Sadi@blr.com.

Learn more and register at *www.mleesmith.com/tn-probate*