Santa Clara Law and the Santa Clara University Office of Planned Giving present the 12th Annual

JERRY A. KASNER ESTATE PLANNING SYMPOSIUM

SEPTEMBER 29-30, 2016

SANTA CLARA LAW

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JERRY A. KASNER ESTATE PLANNING SYMPOSIUM

THURSDAY, SEPTEMBER 29 & FRIDAY, SEPTEMBER 30, 2016

Santa Clara Convention Center
5001 Great America Parkway, Santa Clara, California 95054

THURSDAY, SEPTEMBER 29
11 a.m. Registration
12:50 – 5 p.m. Program
Reception to follow

FRIDAY, SEPTEMBER 30
7 a.m. Registration & Continental Breakfast
8:20 a.m. – 4:30 p.m. Program
Reception to follow

$450 per person
$475 after August 31, 2016

Continuing education credits available.
Seating is limited.

REGISTRATION

Online at law.scu.edu/kasner

REGISTRATION DEADLINE: FRIDAY, SEPTEMBER 16, 2016

The Symposium honors Jerry A. Kasner (1933–2004), attorney, CPA, and nationally renowned author and speaker, who served as professor of Tax Law and Estate Planning at Santa Clara Law from 1961–1998.

Symposium proceeds fund the Kasner Professorship focusing on Estate Planning at Santa Clara Law.

Please direct questions to LawAlumni@scu.edu or call 408-551-1748.

If you have a disability that requires an accommodation, please call 408-551-1748 or TTY California Relay at 800-735-2929 at least 72 hours prior to the event.

THURSDAY, SEPTEMBER 29, 2016

REGISTRATION 11 a.m. – 12:50 p.m.

WELCOME 12:50 – 1 p.m.

Charles H. Packer, Esq. | Hopkins & Carley, A Law Corporation

THURSDAY GENERAL SESSION 1 - 2:45 p.m.

CURRENT CALIFORNIA DEVELOPMENTS IN ESTATE PLANNING AND ADMINISTRATION
Robert E. Temmerman, Jr., Esq. | Temmerman, Cilley & Kohlmann, LLP

AFTERNOON BREAK 2:45 - 3 p.m.

THURSDAY BREAKOUT SESSIONS 3 – 4:45 p.m.

A1: FUNDAMENTALS TRACK: ESSENTIAL ESTATE PLANNING CONCEPTS: A PRIMER
Charles H. Packer, Esq. | Hopkins & Carley, A Law Corporation
Lynn C. Stutz, Esq. | Stutz Law

A2: LIFE INSURANCE FOR MODERN ESTATE PLANNING: A REVIEW OF CURRENT PRACTICES, BEST PRACTICES, AND WHY THERE IS A DIFFERENCE
Thomas Kanaley, J.D., DBA | The Nautilus Group
Jeffrey M. Ostrum, CFP | Financial Architects Partners
Thomas J. Pauloski, Esq. | AB Bernstein Private Wealth Management

A3: PROPER BENEFICIARY DESIGNATIONS AND FIXING IMPROPER ONES
Michael J. Jones, CPA | Thompson Jones LLP

A4: CARING FOR YOUR SPECIAL NEEDS CHILD FOR YOUR LIFETIME AND BEYOND
Jennifer M. Cunneen, Esq. | Cunneen Law
Bradford L. Elman, CLU | Northwestern Mutual
Greg Finn | Fremont Bank
Karen M. Park | AB Bernstein Private Wealth Management

A5: THE POST-NUCLEAR FAMILY: DEFINING SPOUSES AND DESCENDANTS IN THE 21st CENTURY
Patricia A. Cain, Professor of Law | Santa Clara Law
Nicole M. Pearl, Esq. | McDermott Will & Emery LLP

FIRST DAY PROGRAM ROUND UP AND PROGRAM HIGHLIGHTS FOR FRIDAY 4:45 - 4:50 p.m.

Charles H. Packer, Esq. | Hopkins & Carley, A Law Corporation

LIGHT REFRESHMENTS TO FOLLOW

FRIDAY, SEPTEMBER 30, 2016

REGISTRATION 7 – 8:20 a.m.

WELCOME 8:20 – 8:30 a.m.

Charles H. Packer, Esq. | Hopkins & Carley, A Law Corporation
Denise Riley, Esq. | Northern Trust

FIRST FRIDAY GENERAL SESSION 8:30 – 10 a.m.

FEDERAL TAX UPDATE (AND MORE)
Samuel A. Donaldson, Professor of Law | Georgia State University

MORNING BREAK 10 – 10:15 a.m.

FIRST FRIDAY BREAKOUT SESSIONS 10:15 – 11:45 a.m.

B1: FUNDAMENTALS TRACK: DRAFTING ADMINISTRATIVE TRUST PROVISIONS FOR THE 21ST CENTURY
Liza Hanks, Esq. | Finch Montgomery Wright LLP
Denise M. Riley, Esq. | Northern Trust

B2: RUNNING THE BASIS (CATCHING MAXIMUM TAX SAVINGS)
Paul S. Lee, Esq. | Northern Trust

B3: THE DONOR, THE ADVISOR, THE CHARITY, AND THE GIFT COMPLEX ESTATE GIFT STRATEGIES – A CASE STUDY OF THE "MY OWN BUSINESS INSTITUTE"
S. Andrew Starbird, Ph.D, Professor, Moderator | Santa Clara University
Lawrence Donatoni | Santa Clara University
David Wheeler Newman, Esq. | Mitchell Silberberg & Knupp LLP

B4: REJUVENATING STALE IRREVOCABLE TRUSTS: IF IT IS BROKEN, THEN DO FIX IT – PART I
Nancy G. Henderson, Esq. | Henderson, Caverly, Plum & Charney LLP

B5: EXPERT WITNESSES: OPINING FROM EITHER SIDE OF THE AISLE
John A. Hartog, Esq. | Hartog & Baer
Robert E. Temmerman, Jr., Esq. | Temmerman, Cilley & Kohlmann, LLP

LUNCH 11:50 – 12:50 p.m.

INTRODUCTION: Charles H. Packer, Esq. | Hopkins & Carley, A Law Corporation
INVOCATION: Paul Goda, S.J. | Santa Clara Law
COMMENTS: Francis B. Doyle, Esq. | WealthPLAN
DISMISSAL: Lynn Stutz, Esq. | Stutz Law

SYMPOSIUM SCHEDULE AND PRESENTERS

FRIDAY, SEPTEMBER 30, 2016

SECOND FRIDAY BREAKOUT SESSIONS 1 – 2:30 p.m.

C1: FUNDAMENTALS TRACK: DRAFTING QTIP TRUSTS IN THE NEW ERA OF PORTABILITY
Darin Donovan, Esq. | Hopkins & Carley, A Law Corporation
Francis B. Doyle, Esq. | WealthPLAN
Brian L. Shetler, Esq. | Berliner Cohen

C2: TRUST AND ESTATE SETTLEMENTS: AVOIDING A TAX HEADACHE
Laurelle M. Gutierrez, Esq. | McDermott Will & Emery LLP
Robin L. Klomparens, Esq. | Wagner Kirkman Blaine Klomparens & Youmans LLP

C3: CHARITABLE CURRENT DEVELOPMENTS
David Wheeler Newman, Esq. | Mitchell Silberberg & Knupp LLP

C4: REJUVENATING STALE IRREVOCABLE TRUSTS: IF IT IS BROKEN, THEN DO FIX IT – PART II
Nancy G. Henderson, Esq. | Henderson, Caverly, Plum & Charney LLP

C5: PROPOSED REVISION TO ACTEC COMMENTARIES ON ETHICS
Patricia A. Cain, Professor of Law, Moderator | Santa Clara Law
Karen Boxx, Professor of Law | University of Washington
Bryan D. Kirk, Esq. | Fiduciary Trust International

AFTERNOON BREAK 2:30 – 2:45 p.m.

SECOND FRIDAY GENERAL SESSION 2:45 – 4:15 p.m.

PLANNING OPPORTUNITIES (AND TRAPS) WITH BUSINESS ENTITIES, EMPHASIS ON INCOME TAXATION
Samuel A. Donaldson, Professor of Law | Georgia State University

CLOSING COMMENTS 4:15 – 4:30 p.m.

Charles H. Packer, Esq. | Hopkins & Carley, A Law Corporation

NETWORKING RECEPTION 4:30 – 6 p.m.

Register online: law.scu.edu/kasner

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