The 9th annual Jerry A. Kasner
Estate Planning Symposium

was held on

Friday, September 27, 2013
at the Hyatt Regency Santa Clara

Sponsors
Symposium Schedule

Join us for a one-day estate planning seminar for attorneys, accountants, certified life underwriters, bank trust and investment officers, financial advisers, and other wealth planning professionals. The seminar will provide attendees with most current information regarding the tax, legal, and financial issues concerning estate planning and trust and estate administration. The program includes a series of individual presentations, lunch, breakout sessions, and an afternoon reception. CLE credit hours offered.

New this year!

Kasner Fundamentals
A course for professionals interested in estate planning

Thursday, September 26, 2013
Santa Clara University, Benson Center

Kasner Fundamentals Class Schedule

Thank you to our 2013 symposium sponsors:

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For more information on the Symposium, Fundamentals Course, or 2013 sponsorship opportunities, please contact:

Phone: (408) 551-1748
Email: MJShort@scu.edu

Ninth Annual Kasner Symposium Schedule

7:30 – 8:20 a.m. (50 minutes) — **Registration & Continental Breakfast**

8:20 – 8:30 a.m. (10 minutes) — **Welcome**

- **Charles H. Packer, Esq., *Hopkins & Carley, A Law Corporation***
- **Dean Lisa Kloppenberg, Esq., *Santa Clara Law***
- **Chad G. Reddy, *U.S. Trust, Bank of American Private Wealth Management***

8:30 – 10:00 a.m. (90 minutes) — **CURRENT CALIFORNIA DEVELOPMENTS IN ESTATE PLANNING AND ADMINISTRATION**

- **Robert E. Temmerman, Jr., Esq., *Temmerman, Cilley & Kohlmann, LLP***

10:00 -10:10 a.m. (10 minutes) — **Morning Break**

10:10 -11:50 a.m. — **FEDERAL TRANSFER TAX UPDATE**

(100 minutes)

- **Steve R. Akers, Esq., *Bessemer Trust***

12:00 noon-12:50 p.m. (50 minutes) **Lunch Schedule**

- **Introduction: Charles H. Packer, Esq., *Hopkins & Carley, A Law Corp.***
- **Invocation: Paul Goda, S.J., *Santa Clara Law***
- **Dismissal: Lynn Stutz, Esq., *Attorney at Law***

1:00 -2:15 p.m. (75 minutes) **First Breakout Sessions:**

Session A1:
PANEL: ESTATE PLANNING AND ADMINISTRATION IN THE NEW ERA OF PORTABILITY

- **Michael J. Jones, CPA, *Thompson Jones LLP***
- **John W. Prokey, Esq., *Ramsbacher Prokey LLP***

Session A2:
PANEL: WOULDA, COULDA, SHOULDA: THINGS A PROFESSIONAL FIDUCIARY MIGHT NOT TELL YOU DURING ADMINISTRATION (BUT REALLY WISHES YOU HAD CONSIDERED IN ADVANCE)

- **Paul Barulich, Esq., Moderator, *Barulich Dugoni Law Group Inc.***
- **R. Hugh Magill, Esq., *Northern Trust***
- **James M. Marion, Esq. *U.S. Trust, Bank of America***
- **John L. McDonnell, Jr., Esq., *Reed Smith***

Session A3:
PANEL: WHAT EVERY ESTATE PLANNER SHOULD KNOW ABOUT INTERNATIONAL TAX & ESTATE PLANNING

- **Jonathan C. Lurie, Esq., *McDermott Will & Emery LLP***
- **M. Read Moore, Esq., *McDermott Will & Emery LLP***

Session A4:
PANEL: LIFE INSURANCE I: FOCUS ON THE FUNDAMENTALS

- **Thomas J. Kanaley, J.D., Moderator, *The Nautilus Group***
- **Gregory W. Holmgren, CLE, ChFC, *New York Life***

Insurance Company

- **Thomas Pauloski, Esq.,** ***Bernstein Global Wealth Management***

Session A5:
RECENT DEVELOPMENTS IN CHARITABLE PLANNING

- **Elizabeth A. Bawden, Esq.,** ***McKenna, Long & Aldridge LLP***
- **Claudia Sangster, Esq.,** ***Harris myCFO LLC***

Session A6:
YOUR CLIENTS MAY NOT BE CYBORGS BUT YOU STILL MUST PLAN FOR THEIR DIGITAL ASSETS

- **Gerry W. Beyer, Governor Preston E. Smith Regents Professor of Law,** ***Texas Tech University School of Law***

2:25 -3:40 p.m
(75 minutes)

Second Breakout Sessions:

Session B1:
PANEL: ESTATE PLANNING AND ADMINISTRATION IN THE NEW ERA OF PORTABILITY (Repeat of Session A1)

- **Michael J. Jones, CPA,** ***Thompson Jones LLP***
- **John W. Prokey, Esq.,** ***Ramsbacher Prokey LLP***

Session B2:
PANEL: WOULDA, COULDA, SHOULDA: THINGS A PROFESSIONAL FIDUCIARY MIGHT NOT TELL YOU DURING ADMINISTRATION (BUT REALLY WISHES YOU HAD CONSIDERED IN ADVANCE) (Repeat of Session A2)

- **Paul Barulich, Esq., Moderator,** ***Barulich Dugoni Law Group Inc.***
- **R. Hugh Magill, Esq.,** ***Northern Trust***
- **James M. Marion, Esq.** ***U.S. Trust, Bank of America***
- **John L. McDonnell, Jr., Esq.,** ***Reed Smith***

Session B3:
PANEL: INTERNATIONAL ESTATE PLANNING

DEVELOPMENTS

- **Jonathan C. Lurie, Esq.,** ***McDermott Will & Emery LLP***
- **M. Read Moore, Esq.,** ***McDermott Will & Emery LLP***

Session B4:
PANEL: LIFE INSURANCE II: MAKING A GREAT PLAN BETTER

- **Thomas J. Kanaley, J.D., Moderator,** ***The Nautilus Group***
- **Thomas Pauloski, Esq.,** ***Bernstein Global Wealth Management***

Session B5:
CALIFORNIA REAL PROPERTY TAXATION

- **Sarah M. King, Esq.,** ***Tufts Stephenson & Kasper, LLP***

Session B6:
PANEL: ETHICAL, LEGAL, AND PRACTICAL ISSUES FACING ADVISORS WHO COUNSEL OLDER CLIENTS

- **John F. Hopkins, Esq.,** ***Hopkins & Carley, A Law Corporation***
- **David W. Mitchell, Esq.,** ***Hoge Fenton***

3:40 -3:55 p.m.
(15 minutes)

Afternoon Break

4:00 -4:10 p.m.
(10 minutes)

Kasner Video

- **Comments by: Francis B. Doyle, Esq.,** ***WealthPLAN***

4:10 -5:30 p.m.
(80 minutes)

PANEL: SILICON VALLEY ESTATE PLANNING: DREAM OR NIGHTMARE?

- **M. Read Moore, Esq., Moderator,** ***McDermott Will & Emery LLP***
- **Gerry W. Beyer, Governor Preston E. Smith Regents Professor of Law,** ***Texas Tech University School of Law***
- **Jonathan C. Lurie, Esq.,** ***McDermott Will & Emery LLP***

5:30 -5:40 p.m. (10 minutes)	**Closing Comments:** • **Charles H. Packer, Esq.,** ***Hopkins & Carley, A Law Corporation***
5:45 -7:45 p.m. (120 minutes)	**Reception**

Kasner Fundamentals Schedule

12:30 -12:55 p.m. (25 minutes)	**Registration & Welcome** • **Francis B. Doyle, Esq.,** ***WealthPLAN***
1:00 -2:10 p.m. (70 minutes)	**Session One:** **PLANNING & DRAFTING EFFECTIVE REVOCABLE LIVING TRUST DOCUMENTS** • **Patricia A. Cain,** ***Distinguished Professor of Law and Author, Santa Clara Law*** • **Darin H. Donovan, Esq.,** ***Hopkins & Carley, A Law Corporation***
2:10 -3:20 p.m. (70 minutes)	**Session Two:** **LIFE INSURANCE PLANNING AND IRREVOC ABLE TRUSTS** • **Brian L. Shetler, Esq.,** ***Berliner Cohen, Attorneys at Law*** • **Thomas J. Kanaley, J.D.,** ***The Nautilus Group***
3:20 -4:30 p.m. (70 minutes)	**Session Three:** **INCOME TAX ISSUES IN IRREVOCABLE TRUST ADMINISTRATION** • **Lynn K. Telford, EA, TEP,** ***Berger Lewis Accountancy Corporation***
4:30 -5:30 p.m. (60 minutes)	**Networking Reception** **Williman Room, Benson Center. 1st Floor**