Advanced Planning Conference
7:45 AM – 4:45 PM
September 5, 2024

Time	Content	Objectives
7:15 – 7:45	Registrant Check-In	
7:45 – 8:00	Welcome & Introductions	• Welcome audience and introduce speakers • Workshop goals • Logistics
8:00 – 8:25	Recent and Pending Issues	• 2026 Tax law “cliff” • IRS CCA on tax consequences of decanting
8:25 – 10:05	Planning for Special Situations	• Planning for blended families • Special needs planning • Spendthrift Protection planning • Medicaid asset protection planning
10:05 – 10:20	Break	
10:20 – 12:00	Ethics in Client Representation	• Joint representation • Competent representation • Conflicts of interest • Fiduciary duties and responsibilities
12:00 – 12:45	Lunch	
12:45 – 1:45	Utilizing Planned Giving to Enhance Results	• Charitable planned giving through structures offering benefits and control • Community foundation special control features • Donor advised fund multitude of uses • Charitable remainder trusts, the return of a great technique • Combining planned giving and retirement plans
1:45 – 2:45	Estate Planning for the Retirement Plan	• Lifetime distribution rule changes • SECURE 2.0 regulations • IRS treatment of trusts as beneficiaries
2:45 – 3:00	Break	
3:00 – 4:30	Tax update	Local tax professional
4:30 – 4:45	Closing Remarks	