

**SANTA
CLARA
LAW**

JERRY A. KASNER
ESTATE PLANNING
SYMPOSIUM

**THURSDAY, SEPTEMBER 7 &
FRIDAY, SEPTEMBER 8, 2017**

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

THURSDAY, SEPTEMBER 7
8:30 a.m. Registration
10 a.m. – 4:30 p.m. Program
Reception to follow

FRIDAY, SEPTEMBER 8
7 a.m. Registration & Continental Breakfast
8:30 a.m. – 1 p.m. Program

\$450 per person
\$475 after August 15, 2017

Continuing education credits available.
Seating is limited.

REGISTRATION

Online at law.scu.edu/kasner

REGISTRATION DEADLINE: FRIDAY, AUGUST 25, 2017

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.

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Santa Clara Law and the Santa Clara University
Office of Planned Giving present the 13th Annual

JERRY A. KASNER ESTATE PLANNING SYMPOSIUM

SEPTEMBER 7-8, 2017



**SANTA
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LAW**

THURSDAY, SEPTEMBER 7, 2017

REGISTRATION 8:30 - 10 a.m.

WELCOME 10 - 10:10 a.m.

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

FIRST THURSDAY SESSIONS 10:15 - 11:45 a.m.

A1: FUNDAMENTALS TRACK: FINANCIAL DPA AND HEALTH CARE DIRECTIVES

Liza W. Hanks, Esq. | GCA Law Partners LLP

A2: CLEAR, COORDINATED, CREATIVE: WHAT EVERY ESTATE PLANNING ADVISOR SHOULD KNOW ABOUT PRACTICAL LIFE INSURANCE POLICY DESIGN AND MAINTENANCE

Gregory W. Holmgren, CLU, ChFC | New York Life

A3: NEW TAX LEGISLATION: REALITY OR MERELY A FIGMENT OF SOMEONE'S IMAGINATION

Michael J. Jones, CPA | Thompson Jones LLP

A4: EVOLVING USES OF FLPs IN TIMES OF CHANGE

Paul S. Lee, Esq. | Northern Trust

BOOTCAMP I: REAL ESTATE TRANSFER DOCUMENTS

Discussion Leader: Brian L. Shetler, Esq. | Berliner Cohen LLP

LUNCH 12 - 1 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 C. Stutz, Esq. | Ropers Majeski Kohn Bentley

SECOND THURSDAY SESSIONS 1:15 - 2:45 p.m.

B1: FUNDAMENTALS TRACK: ABCs OF CHARITABLE PLANNING: AN INTRODUCTION TO ACHIEVING CLIENTS' PERSONAL AND PHILANTHROPIC GOALS

Anne LeClair J.D. | Santa Clara University, Office of Planned Giving

Megan Mills, Esq. | Santa Clara University, Office of Planned Giving

B2: QUALIFIED SMALL BUSINESS STOCK

Benetta P. Jenson, Esq. | J. P. Morgan Private Bank

Stuart J. Kohn, Esq. | Levenfeld Pearlstein, LLC

B3: IT'S A GREAT PLAN (FOR MY PARENTS), BUT HOW DOES THE "CRUMMEY" AND "DEFECTIVE" PLAN WORK FOR ME?

Justin T. Miller, Esq. | BNY Mellon Wealth Management

B4: TAX PLANNING CONSIDERATIONS FOR NON-U.S. PERSONS WITH U.S. ASSETS

Diana M. Hastings, Esq. | Withers LLP

Wenli Wang, CPA | Moss Adams

BOOTCAMP II: BENEFICIARY DESIGNATION FORMS

Discussion Leader: Michael J. Jones, CPA | Thompson Jones LLP

THURSDAY GENERAL SESSION 3 - 4:30 p.m.

CURRENT CALIFORNIA DEVELOPMENTS IN ESTATE PLANNING AND ADMINISTRATION

Robert E. Temmerman, Jr., Esq. | Temmerman, Cilley & Kohlmann, LLP

Patrick A. Kohlmann, Esq. | Temmerman, Cilley & Kohlmann, LLP

FIRST DAY PROGRAM ROUND UP AND PROGRAM HIGHLIGHTS FOR FRIDAY

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

INFORMAL NETWORKING RECEPTION 4:45 - 6 p.m.

FRIDAY, SEPTEMBER 8, 2017

REGISTRATION 7 - 8:20 a.m.

WELCOME 8:20 - 8:30 a.m.

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

Lisa Kloppenberg, Dean and Professor of Law | Santa Clara Law

Denise M. Riley, Esq. | Northern Trust

FRIDAY MORNING SESSIONS 8:30 - 10 a.m.

C1: FUNDAMENTALS TRACK: ASSIGNMENTS, DEEDS, AND OTHER TRANSFER DOCUMENTS

Brian L. Shetler, Esq. | Berliner Cohen LLP

C2: TRUMPING TAXES: ELEVATED PLANNING IN EVOLUTIONARY ENVIRONMENTS

Julie Miraglia Kwon, Esq. | McDermott Will & Emery

Carlyn S. McCaffrey, Esq. | McDermott Will & Emery

C3: DISPUTE RESOLUTION, COMMUNICATION, MEDIATION, LITIGATION

Lisa Kloppenberg, Dean and Professor of Law | Santa Clara Law

With Special Introduction by Philip J. Hayes, Esq. | Bessemer Trust

Kristofer W. Biorn, Esq. | Crist | Biorn | Shepherd | Roskoph

Steven P. Braccini, Esq. | Hopkins & Carley, A Law Corporation

Bryan D. Kirk, Esq. | Fiduciary Trust International of California

C4: CHOOSING THE RIGHT CHARITABLE VEHICLE: A GUIDE TO DAFs, PFs, AND SOs

Barbara A. Murphy, Esq. | Farella Braun + Martel LLP

C5: NAVIGATING THE UNCERTAIN WATERS OF PROPOSITION 13

Bradley R. Marsh, Esq. | Greenberg Traurig

MORNING BREAK 10 - 10:15 a.m.

FRIDAY GENERAL SESSION 10:15 - 11:45 a.m.

FEDERAL TAX UPDATE (AND MORE)

Samuel A. Donaldson, Professor of Law | Georgia State Law

QUESTION AND ANSWER SESSION 11:45 a.m. - 12:45 p.m.

Patricia A. Cain, Professor of Law, Moderator | Santa Clara Law

Samuel A. Donaldson, Professor of Law | Georgia State Law

Carlyn S. McCaffrey, Esq. | McDermott Will & Emery

John W. Prokey, Esq. | Ramsbacher Prokey Leonard LLP

CLOSING COMMENTS 12:45 - 1 p.m.

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

LUNCH ON YOUR OWN 1 - 2 p.m.

BONUS CREDITS 2 - 3 p.m.

D1: ETHICS

Alison P. Buchanan, Esq. | Hoge Fenton Jones & Appel, Inc.

D2: COMPETENCE

Cynthia Chandler, Esq. | Bay Area Legal Incubator (BALI)

D3: STARTING YOUR ESTATE PLANNING PRACTICE

Christine M. Kouvaris, Esq. | Law Offices of Christine M. Kouvaris Inc.

Camelia Mahmoudi, Esq. | Law Office of Camelia Mahmoudi

BONUS CREDITS 3 - 4 p.m.

E1: ELIMINATION OF BIAS

Gretchen E. Birkheimer, Esq. | Pierce & Shearer LLP

E2: CLOSING YOUR ESTATE PLANNING PRACTICE

Lynn C. Stutz, Esq. | Ropers Majeski Kohn Bentley

Register online: law.scu.edu/kasner