

Santa Clara Law and the Santa Clara University
Office of Planned Giving present the 11th Annual

JERRY A. KASNER ESTATE PLANNING SYMPOSIUM

SEPTEMBER 17-18, 2015



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JERRY A. KASNER
ESTATE PLANNING
SYMPOSIUM

THURSDAY, SEPTEMBER 17 &
FRIDAY, SEPTEMBER 18, 2015

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

THURSDAY, SEPTEMBER 17

12:30 p.m. Registration
1:00 p.m. – 5:00 p.m.

FRIDAY, SEPTEMBER 18

7:30 a.m. Registration & Continental Breakfast
8:00 a.m. – 5:30 p.m.
Reception to follow

\$450 per person
\$475 after August 31, 2015

Continuing education credits available.
Seating is limited.

REGISTRATION

Online at law.scu.edu/kasner

REGISTRATION DEADLINE: THURSDAY, SEPTEMBER 10, 2015

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 17, 2015

REGISTRATION 12:30 p.m. – 1:10 p.m.

WELCOME 1:10 p.m. – 1:20 p.m.

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

FIRST THURSDAY BREAKOUT SESSIONS 1:30 p.m. – 2:30 p.m.

A1: FUNDAMENTAL TRACK: ESTATE PLANNING FOR EMPLOYEE BENEFITS

Michael J. Jones, CPA | Thompson Jones LLP

Elijah M. Keyes, Esq. | Gilfix & La Poll Associates LLP

A2: GRANTOR INTENT & FIDUCIARY FLEXIBILITY:

DRAFTING FOR THE LONG HAUL

R. Hugh Magill, Esq. | Northern Trust

A3: THE ETHICS OF BEING MORTAL

Ann Skeet, Director, Leadership Ethics | Santa Clara University Markkula Center

SECOND THURSDAY BREAKOUT SESSIONS 2:45 p.m. – 3:45 p.m.

B1: FUNDAMENTAL TRACK: ADVANCE HEALTH CARE DIRECTIVES

Janis A. Carney, Esq. | Carney Elder Law

Dr. Elizabeth Landsverk, MD | Elder Consult Geriatric Medicine

Judy Passaglia, CNS, RN, ACHPN | Stanford Health Care

B2: THE 21ST CENTURY MEGA-INSURANCE TRUST:

**DESIGNING THE ILIT TO PROVIDE MAXIMUM CONTROL,
PROTECTION, AND FLEXIBILITY (will be repeated as session D5)**

Steven J. Oshins, Esq. | Oshins & Associates, LLC

**B3: THE DEVIL IS IN THE DETAILS: TAX ADMINISTRATION & PROCEDURAL
RULES FOR THE ESTATE PLANNER**

M. Read Moore, Esq. | McDermott Will & Emery

THIRD THURSDAY BREAKOUT SESSIONS 4:00 p.m. – 5:00 p.m.

C1: FUNDAMENTAL TRACK: IT BEGINS & ENDS WITH GOOD DRAFTING

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

Darin Donovan, Esq. | Hopkins & Carley, A Law Corporation

**C2: DO YOU KNOW YOUR TRUSTEE? THE GOOD, THE BAD
& THE UGLY CHOICES (will be repeated as session D4)**

Paul J. Barulich, Esq. | Barulich Dugoni Law Group Inc.

**C3: ALL ABOUT THAT BASE & NATURE OF THE ASSETS
(will be repeated as session E5)**

Paul S. Lee, Esq. | Northern Trust

FIRST DAY PROGRAM ROUND UP AND
PROGRAM HIGHLIGHTS FOR FRIDAY 5:00 p.m. – 5:15 p.m.

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

LIGHT REFRESHMENTS 5:15 p.m. – 6:00 p.m.

FRIDAY, SEPTEMBER 18, 2015

REGISTRATION & CONTINENTAL BREAKFAST 7:30 a.m. – 8:20 a.m.

WELCOME 8:20 a.m. – 8:30 a.m.

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

Jim Lyons, VP University Relations | Santa Clara University

Denise Riley, Esq. | Northern Trust

FIRST FRIDAY GENERAL SESSION 8:30 a.m. – 10:00 a.m.

**CURRENT CALIFORNIA DEVELOPMENTS IN ESTATE PLANNING
AND ADMINISTRATION**

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

SECOND FRIDAY GENERAL SESSION 10:15 a.m. – 11:45 a.m.

FEDERAL TAX UPDATE (AND MORE)

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

LUNCH 11:50 p.m. – 12:50 p.m.

FIRST FRIDAY BREAKOUT SESSIONS 1:00 p.m. – 2:00 p.m.

D1: TIES THAT DON'T BIND:

SETTLORS' & BENEFICIARIES' TAX-SENSITIVE POWERS

Carol A. Harrington, Esq. | McDermott Will & Emery

Julie Miraglia Kwon, Esq. | McDermott Will & Emery

D2: PART 1 – INCOME TAX PRIMER FOR ESTATE PLANNERS (E2: Part 2)

David M. Sacarelos, CPA | Seiler LLP

Elizabeth S. Sevilla, CLU, ChFC | Seiler LLP

**D3: BUSINESS SUCCESSION PLANNING: CLIENT DILEMMAS
& HOW TO EFFECTIVELY ADDRESS THEM**

Leslie Dashew | Human Side of Enterprise

Michael J. Jones, CPA | Thompson Jones LLP

Justin Miller, Esq. | BNY Mellon Wealth Management

D4: DO YOU KNOW YOUR TRUSTEE? THE GOOD, THE BAD & THE UGLY CHOICES (Repeat of C2)

Paul J. Barulich, Esq. | Barulich Dugoni Law Group Inc.

D5: THE 21ST CENTURY MEGA-INSURANCE TRUST: DESIGNING THE ILIT TO PROVIDE MAXIMUM CONTROL, PROTECTION, AND FLEXIBILITY (Repeat of B2)

Steven J. Oshins, Esq. | Oshins & Associates, LLC

SECOND FRIDAY BREAKOUT SESSIONS 2:15 p.m. – 3:15 p.m.

E1: POWER TO THE PEOPLE: POWERS OF APPOINTMENT – TAX AND PROPERTY LAW ISSUES

Carol A. Harrington, Esq. | McDermott Will & Emery

Julie Miraglia Kwon, Esq. | McDermott Will & Emery

E2: PART 2 – INCOME TAX PRIMER FOR ESTATE PLANNERS (D2: Part 1)

David M. Sacarelos, CPA | Seiler LLP

Elizabeth S. Sevilla, CLU, ChFC | Seiler LLP

E3: DIGITAL ASSETS: FROZEN OR MOVING?

Soyeun D. Choi, Esq. | Law Offices of Soyeun D. Choi

J. Timothy Maximoff, Esq. | Hoge Fenton Jones & Appel

E4: ESTATE & TAX PLANNING FOR UNICORNS & OTHER EXOTIC GAME

Leigh Wasson, Moderator | BNY Mellon Wealth Management

Lara N. Gilman, Esq. | Farella Braun + Martel LLP

David Howard, Esq. and CPA | Loomis & Company, LLP

Ashmeet Sidana, CPA | Engineering Capital (VC)

Michael J. Torosian, Esq. and CPA | DLA Piper

E5: ALL ABOUT THAT BASE & NATURE OF THE ASSETS (Repeat of C3)

Paul S. Lee, Esq. | Northern Trust

Q & A SESSION 3:30 p.m. – 5:00 p.m.

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

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

Francis B. Doyle, Esq. | WealthPLAN

Carol A. Harrington, Esq. | McDermott Will & Emery

CLOSING COMMENTS 5:00 p.m. - 5:15 p.m.

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

NETWORKING RECEPTION 5:15 p.m. – 7:00 p.m.

Register online: law.scu.edu/kasner

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