JERRY A. KASNER
ESTATE PLANNING SYMPOSIUM

SEPTEMBER 29-30, 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


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

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

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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

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

LIGHT REFRESHMENTS TO FOLLOW
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.