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23RD BIENNIAL

ADVANCED ESTATE PLANNING SYMPOSIUM



Formerly held at the University of Denver College of Law!
Theodore B. Atlass, Program Chair

LIVE PROGRAM and LIVE WEBCAST
September 10 and 11, 2009

Live program will be held at the CBA-CLE Classroom, 1900 Grant Street, Suite 300, Denver, CO

VIDEO REPLAYS: September 30 and October 1, 2009
In Denver, Colorado Springs, and Grand Junction

Submitted for 15 General CLE Credits

PROGRAM SPONSORS:

- Atlantic Trust ■ Colorado State Bank & Trust, N.A.
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- Trust & Estate Section of the Colorado Bar Association

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PROGRAM AGENDA • DAY ONE • THURSDAY, SEPTEMBER 10, 2009

8:00 - 9:00 am Registration & Continental Breakfast

9:00 - 9:05 am Welcome & Opening Remarks
Extended by Theodore B. Atlass, Program Chair

9:05 - 10:00 am Estate Planning Challenges for Clients With Diminished Capacity
(and Their Lawyers)
*Presented by James R. Walker, Rothgerber, Johnson & Lyons LLP,
Denver, CO*

10:00 - 10:20 am Refreshment Break

10:20 - 11:10 am GRAT Planning: Up Close and Personal
Presented by Laura S. Hundley, Holland & Hart LLP, Boulder, CO

11:10 am - 12:00 pm Estate Planning Strategies for Deflation and a Low
Interest Rate Environment
Presented by Raymond L. Sutton, Jr., Baker & Hostetler LLP, Denver, CO

12:00 - 1:00 pm Lunch (On your own)

1:00 - 1:50 pm What Every Advisor Needs to Know About Charitable Giving: What
Your Clients Should Expect from You and What You and Your
Clients Should Expect from Charities
*Presented by Scott Lumpkin, Associate Vice Chancellor, University of
Denver, Denver, CO*

1:50 - 2:40 pm What's REALLY Happening in Private Duty/Private Pay Home
Health Care, and Why Should This Matter to Trust and
Estate Planners?
Presented by Blake Martin, Right at Home, Inc., Omaha, NE

2:40 - 3:00 pm Refreshment Break

PROGRAM AGENDA • DAY ONE • THURSDAY, SEPTEMBER 10, 2009 *continued*

3:00 - 3:50 pm Emerging Issues Under the Twin UPIAs (The Uniform Prudent Investor Act and Uniform Principal & Income Act)
Presented by Susan Porter, Managing Director, US Trust, New York, NY

3:50 - 4:40 pm Domestic Asset Protection: Choice of Entity and Choice of Techniques
Presented by Thomas N. Long, Long Reimer Winegar LLP, Cheyenne and Jackson, WY

4:40 pm Adjourn - Day One

PROGRAM AGENDA • DAY TWO • FRIDAY, SEPTEMBER 11, 2009

8:00 - 9:00 am Registration & Continental Breakfast

9:00 - 10:10 am Federal Tax Law Update for Trust and Estate Practitioners (2007 - 2009)
Presented by Turney P. Berry, Wyatt, Tarrant & Combs, LLP, Louisville, KY

10:10 - 10:30 am Refreshment Break

10:30 - 11:10 am Estate Planning for the Next Generation of Clients: It's Not Your Father's Buick, Anymore
Professor Jeffrey N. Pennell, Emory University School of Law, Atlanta, GA

11:10 - 11:35 am Colorado Trust and Estate Law Update (2007 - 2009)
Presented by Shelly D. Merritt, Shelly D. Merritt, P.C., Boulder, CO

11:35 am - 12:00 pm Update from the Bench
Presented by the Honorable Jean Stewart, Judge, Probate Court, Denver, CO

12:00 - 12:50 pm Lunch (On your own)

12:50 - 1:40 pm The New Biology and Its Implications in Estate Planning
Presented by Professor Kristine S. Knaplund, Pepperdine University School of Law, Malibu, CA

1:40 - 2:00 pm Refreshment Break

2:00 - 3:00 pm Ask the Experts: A Question and Answer Panel
Presented by Douglas M. Cain, Sherman & Howard, L.L.C., Denver, CO; Marc Darling, Wade Ash Woods Hill & Farley, P.C., Denver, CO; John DeBruyn, John DeBruyn Law Offices, Denver, CO, and Kevin D. Millard, Chorney & Millard LLP, Denver, CO

QUESTIONS TO BE SUBMITTED IN WRITING AT THE CONFERENCE PRIOR TO NOON ON FRIDAY, SEPTEMBER 11, 2009.

3:00 - 3:50 pm Estate Planning for Unmarried Couples
Presented by Elizabeth A. Bryant, Elizabeth A. Bryant, P.C., Denver, CO

3:50 - 4:40 pm Little Known and Unexpected Income Tax Issues Arising in Everyday Estate Planning Situations
Presented by Theodore B. Atlass, Atlass Professional Corporation, Denver, CO

4:40 pm Adjourn - Day Two

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WEBCAST INFORMATION

Course materials are provided in electronic format to all webcast attendees. For individuals who prefer to receive the materials in paper form, you must make this request at the time of registration. Once CBA-CLE has final materials prepared, they will be shipped immediately upon your request, but we cannot guarantee that you will receive them prior to the program.

TIPS FOR A BETTER WEBCAST EXPERIENCE:

- Your computer should have a 500 mhz or higher processor and at least 128 megs of RAM
- Hi-Speed connection - Viewers with faster and more consistent connections will have a better viewing experience.

IMPORTANT - DO YOU HAVE A FIREWALL OR ROUTER?

It is possible that your firewall may block the stream or that your router may not pass the stream correctly. Try temporarily disabling the firewall to see if the stream works, or have your network administrator look into it.

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Here is a link to the Microsoft Media Player website to help you determine which version of Media Player is right for your computer.

www.microsoft.com/windows/windowsmedia/players.aspx

ADDITIONAL INFORMATION:

Additional information and instructions regarding connecting to the webcast will be e-mailed to you approximately 1-5 business days before the webcast.

REGISTER FOR THIS PROGRAM ONLINE!
Go to www.cobar.org/cle

ADVANCED ESTATE PLANNING SYMPOSIUM



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2 Or FAX form to... *when using VISA or MasterCard.*
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3 Or MAIL form to... CLE in Colorado
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4 Or register ONLINE... *when using VISA or MasterCard.*
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LIVE PROGRAM / WEBCAST / VIDEO REPLAY ORDER FORM

INDIVIDUAL TUITION:

- Non-member:\$399
- CBA Member:\$359
- CBA Trust & Estate Section Member:\$309
- CBA Elder Law Section Member:\$309

LIVE: September 10-11, 2009 *(Choose between the live program and live webcast)*

- LIVE PROGRAM** - Denver: CBA-CLE Classroom, 1900 Grant St., Suite 300 (PR091010L)
- LIVE WEBCAST** - Direct to your desktop (PR091010W)

NOTE: Registrants who wish to participate via live webcast, must have access to a high-speed internet connection and to important e-mail instructions.

VIDEO REPLAYS: September 30 and October 1, 2009

- Denver: CBA-CLE Classroom, 1900 Grant Street, Suite 300
- Colorado Springs: 421 S. Tejon Street, Suite 100
- Grand Junction: 1250 E. Sherwood Drive

LIVE PROGRAM / WEBCAST / VIDEO REPLAY TOTAL \$ _____

HOMESTUDY ORDER FORM

To receive CLE Credit, you must purchase both the course materials AND the recorded seminar (CD).

COURSE MATERIALS ONLY:

- CBA Member: \$249 Non-member: \$289

COURSE MATERIALS & RECORDED SEMINAR (CD)

- CBA Member: \$359 Non-member: \$399

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