

**New Lawyer's Subcommittee  
Trust & Estates Section of the CBA**

**Agenda for January 21, 2016**

CBA Offices – 9<sup>th</sup> Floor – Terrace Room

- A. Welcome & Introductions
- B. Review and Approval of Minutes from November 19, 2015 Meeting
- C. Presentation by Klaralee Charlton, Associate Attorney with Katz, Look & Onorato, P.C., on the subject of fiduciary tax. Klaralee specializes in estate administration and tax planning. She received her J.D. from the University of Utah, graduating with Honors, and then earned an LL.M. in Tax Law from the University of Denver. Klaralee currently serves as Chair Elect of the Young Lawyers Division of the Denver Bar Association.
- D. Upcoming CLE
  - 1. Estate Planning for “Portability” – Audio Weecast                      Thu, January 21, 2016
    - 1 General Credit
  - 2. Estate Planning Basic Skills 2016    Fri, February 26, 2016
    - 14 General Credits, including 1 Ethics Credit
- E. Study Group Update (1<sup>st</sup> Thursday of each month from 12-1 PM)
- F. Client Conundrums
- G. Adjourn