

Loyola University College of Law
2008 Annual Estate Planning Conference
December 4 - 5, 2008
Pan American Life Center
601 Poydras Street, 11th Floor, Auditorium
New Orleans, Louisiana

Thursday, December 4, 2008

- 8:00 a.m. – 8:30 a.m. Registration
- 8:30 – 9:45 a.m. **Recent Developments in Louisiana Law for the Estate Planning Attorney**
Joseph W. Mengis
Perry, Atkinson, Balhoff, Mengis & Burns, L.L.C.
Baton Rouge, Louisiana
- 9:45 a.m. – 10:00 a.m. Break
- 10:00 a.m. – 11:00 a.m. **New and Current Issues in Form 706 Preparation: Preparer Penalties, Valuation Penalties, Handling Claims Against the Estate**
William A. Neilson
Loyola University College of Law
New Orleans, Louisiana
- 11:00 a.m. – 12:00 a.m. **A Potpourri of Planned Giving Techniques**
Robert S. Gross
Director of Planned Giving - Loyola University
New Orleans, Louisiana
- 12:00 a.m. – 1:15 p.m. Lunch on your own
- 1:15 p.m. – 2:15 p.m. **Sales to ESOPs: An Exit Plan Strategy**
Patrick W. Suffern
Becker & Suffern
Mandeville, Louisiana
- 2:15 p.m. – 2:30 p.m. Break
- 2:30 p.m. – 3:30 p.m. **Comparison of Louisiana Independent Administration with a Revocable Inter Vivos Trust**
Carole Cukell Neff
Sessions, Fishman & Nathan, LLP
New Orleans, Louisiana
- 3:30 p.m. – 4:30 p.m. **Professionalism and Estate Planning – War Stories and Hypo’s to Get Your Hour**
Bruce Spizer
Attorney at Law
New Orleans, Louisiana

Friday, December 5, 2008

- 8:00 a.m. – 8:30 a.m. Registration
- 8:30 a.m. – 9:45 a.m. **Recent Developments in Federal Gift and Estate Taxation**
Jeffrey W. Koonce
Phelps Dunbar
Baton Rouge, Louisiana
- 9:45 a.m. – 10:00 a.m. Break
- 10:00 a.m. – 11:00 a.m. **Marital Deductions Using Usufruct Arrangements vs. Trusts**
James G. Dalferes
David J. Lukinovich, APLC
New Orleans, Louisiana
- 11:00 a.m. – 12:00 p.m. **A Comparison of Utilization of GRATs and Installment Sales to a Grantor Trust and Other Creative Techniques**
F. Kelleher Riess
Hickey and Riess
New Orleans, Louisiana
- 12:00 p.m. – 1:15 p.m. Lunch on your own
- 1:15 p.m. – 2:15 p.m. **Cutting Edge Developments in Family Limited Partnerships and Family LLCs.**
Robert R. Casey
Jones, Walker, Waechter, Poitevent, Carrere & Denegre, LLP
Baton Rouge, Louisiana
- 2:15 p.m. – 2:30 p.m. Break
- 2:30 p.m. – 3:30 p.m. Medicaid Planning
Joel Mendler
Sirote & Permutt
Birmingham, Alabama
- 3:30 p.m. – 4:30 p.m. **Ethics**
Prof. Dane Ciolino
Loyola University College of Law
New Orleans, Louisiana