SUMMARY: The 2017 Estate Planning and Probate Law Survey Course is designed for individuals who practice or are beginning to practice in the estate planning and probate law areas. The course objectives are met through a series of lectures by estate planning and tax practitioners selected for their knowledge and expertise in particular areas. Detailed written outlines are provided for each subject to be covered.

- North Carolina probate and trust law
- Estate, gift and generation-skipping transfer tax
- Planning with real estate, retirement and business interests
- Fiduciary income taxation
## Online Registration Information

**2017 Estate Planning and Probate Law Survey Course**  
#501EPC and #501LWC | September 27–28, 2017

**FOUR WAYS TO REGISTER**

- Online: [www.ncbar.org/CLE](http://www.ncbar.org/CLE)
- Phone: 800.228.3402
- Fax: 919.677.1774
- Mail: Attn: Accounting, NCBA P.O. Box 3688, Cary, NC 27519-3688

*Credit cards only. **Please make checks payable to NCBA.

**TUITION | LIVE • WEBCAST • VIDEO REPLAY (VR)**

<table>
<thead>
<tr>
<th>REGISTRANT TYPE</th>
<th>EARLY BIRD TUITION</th>
<th>REGULAR TUITION</th>
<th>WEBCAST TUITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>NCBA Estate Planning &amp; Fiduciary Law Section Member</td>
<td>$465 □ Live □ VR (see below)</td>
<td>$540 □ Live □ VR (see below)</td>
<td>$565 □ Webcast</td>
</tr>
<tr>
<td>NCBA Member</td>
<td>$485 □ Live □ VR (see below)</td>
<td>$560 □ Live □ VR (see below)</td>
<td>$585 □ Webcast</td>
</tr>
<tr>
<td>NCBA Paralegal Division Member</td>
<td>$310 □ Live □ VR (see below)</td>
<td>$385 □ Live □ VR (see below)</td>
<td>$410 □ Webcast</td>
</tr>
<tr>
<td>Non-member</td>
<td>$560 □ Live □ VR (see below)</td>
<td>$635 □ Live □ VR (see below)</td>
<td>$660 □ Webcast</td>
</tr>
</tbody>
</table>

**FULL-TIME LANC ATTORNEY (NCBA MEMBER)**

- $310 □ Live □ VR (see below)
- $335 □ Webcast

**1ST YEAR LICENSED IN NC (NCBA MEMBER)**

- $198 □ Live □ VR (see below)
- $223 □ Webcast

**CLE PASSPORT HOLDER**

- 14 tokens □ Live □ VR (see below)
- 14 tokens □ Webcast

**VIDEO REPLAY LOCATIONS**

- Cary | #501BAR | January 16–17, 2018
- Charlotte | #501CHA | January 18–19, 2018
- Winston-Salem | #501WIN | January 11–12, 2018
- Other (if applicable, from website): **City:** ____________ | **Code:** #501 ______

**REGISTRANT INFORMATION**

Print Full Name: ____________________________________________________________________________

Firm/Organization Name: ____________________________________________________________________

Address: ___________________________________________________________________________________

City, State and ZIP: _________________________________________________________________________

Daytime Phone Number: ______________________________________________________________________

Email Address: ____________________________________________________________________________

NC State Bar No. (Required for MCLE Credit): __________________________________________________________________________________________

**PAYMENT**

- Enclosed is a check, payable to NCBA
- Please charge my credit card.

Card Number: __________________________ Expiration Date: __________________________

Total Amount: ______________ Signature: __________________________

---

501EPC-B
Program Agenda

Wednesday, September 27, 2017, 8:00a–4:45p

8:00a  Registration

8:25   Welcome and Introductions

8:30   North Carolina Law of Wills  |  Jill L. Peters Kaess

9:15   North Carolina Uniform Trust Code  |  Rebecca L. Smitherman

10:15  Break


11:15  North Carolina Probate Law–Part II  |  Timothy W. Jones

12:00p Networking Lunch (included at Live program only)

12:30  Charitable Giving  |  Douglas W. Benson

1:15   Partnerships, LLCs and Corporations: Estate Planning and Probate Issues  |  Stephanie C. Daniel

2:15   Break

2:30   Property Law: Estate Planning and Probate Issues  |  Jason W. Wenzel

3:15   Estate Planning with Powers of Attorney/Guardianship and Ward  |  Linda F. Johnson

4:00   Retirement Benefits: Estate Planning and Probate Issues  |  John R. Cella Jr.

4:45   Adjourn

BOOK RECOMMENDATION


Managing Editors: Jessica M. Hardin and Heidi E. Royal

Designed as a comprehensive resource for attorneys and paralegals, the bestselling NC Estate Administration Manual is supplemented to reflect recent changes in the law and includes updated forms that you won't want to be without!

The manual discusses legislation on the following topics:

- Administration of decedents’ estates
- Elective share and spousal allowance laws
- Wills
- Uniform Trust Code
- Caveat proceeding statutes

Purchase the fully searchable electronic manual, including fillable/editable forms and other user-friendly features to help you be more efficient in your estate practice, or opt to add the hard copy as well!

Visit www.ncbar.org/CLEBookstore for more information and to order.
Thursday, September 28, 2017, 8:25a–4:45p

8:25a  Welcome and Introductions

8:30  Gross Estate  |  Heidi E. Royal

9:30  Valuation of Gross Estate  |  Andrea C. Chomakos

10:30  Break

10:45  Estate Tax: Estate Tax Deductions, Credits and Payments of Tax  |  Elinor J. “Elie” Foy

11:45  Marital Deduction  |  N. Lucille “Lucy” Siler

12:45p  Networking Lunch (included at Live program only)

1:15  Gift Tax/Uniform Transfers to Minors Act  |  Bradley T. Van Hoy

2:00  Fiduciary Income Tax of Trusts and Estates  |  Sandi O. Thorman

3:00  Break

3:15  Generation-Skipping Transfer Tax  |  Ansley C. Cella

4:00  Annuities and Life Insurance: Estate, Gift and Income Tax Issues  |  Rick E. Graves

4:45  Adjourn

FINE PRINT • REGISTRATION Registrations are limited by space, and may include a live video broadcast overflow room. TRANSFERS Registrants may transfer from a Live program, Video Replay, Webcast, Webinar or Phone/Audio Streaming Program without penalty within three business days after the program date. CANCELLATIONS Cancellations must be received by 9:00 a.m. the third business day prior to the program to qualify for a refund (less $75 administrative fee). Those not attending will receive the digital program materials in full consideration of tuition paid. MCLE CREDIT The North Carolina Bar Association is an accredited CLE sponsor under the MCLE Regulations promulgated by the NC State Bar Board of Continuing Legal Education. This program is approved (but not sponsored) by the Board for the designated number of CLE hours. Each attorney must maintain a record of his/her attendance for the NC State Bar annual report. MCLE credit is reported by NCBA only if a NC State Bar number is provided. Your CLE tuition includes mandatory State Bar fees used to support the State Bar’s Mandatory Continuing Legal Education program, the Chief Justice’s Commission on Professionalism and the Chief Justice’s Equal Access to Justice Commission. Your tuition also includes digital access to all program materials. DIGITAL PROGRAM MATERIALS You will receive a notification email when digital materials are available to download. To retrieve digital materials, log in and select “Your Course Materials” on the CLE website. All of the materials for this program will be available for download in advance of the program. VIDEO REPLAYS To qualify for the Early Bird tuition, registration must be received one week prior to program date. NC State Bar rules require a minimum number of preregistered active State Bar members. NCBA reserves the right to cancel any video program prior to the program date if registrations do not meet the NC State Bar requirement. Some sites require additional registration or evaluation forms. Visit www.tinyurl.com/CLE501EPC to confirm video replay registration and program start times. CLE credit hours at Video Replays are subject to change. Video replay program attendees may purchase the printed manuscript at cost. Due to printing and shipping lead times we are unable to accommodate requests for print materials made fewer than seven (7) days prior to any video replay program. PERSONS WITH DISABILITIES We make every effort to ensure that our programs are held in facilities which are fully accessible to persons with disabilities. If you plan to attend our program and need special facilities or assistance relating to a disability, please contact the CLE Department at least one week prior to the date of the program. INCLEMENT WEATHER We make every effort to notify registrants when a program is canceled or delayed due to weather. If inclement weather is forecast, please check your local news listings or contact event venue. NCBA programs will follow the work schedule of the hosting institutions, to include delayed openings. CLE SCHOLARSHIPS A limited number of scholarships are available to members in financial need. Contact Membership Services at 1.800.662.7405 or email aekemple@ncbar.org. EVENT SPONSOR AND EXHIBITOR OPPORTUNITIES Interested in meeting the attendees of this program? Become an exhibitor or sponsor! Contact Jennifer Shapiro at CLESponsorship@ncbar.org for detailed information about these opportunities and their benefits. FOR MORE INFORMATION, VISIT WWW.NCBAR.ORG/CLE.
Program Information

Planners
- Caitlin N. Horne, Moore & Van Allen PLLC, Charlotte
- Victoria S. Windell, Victoria S. Windell PC, Charlotte
- Beth A. Wood, The Law Offices of Beth A. Wood, Ballantyne

Speakers
- Douglas W. Benson, Foundation for the Carolinas, Charlotte
- Ansley C. Cella, Manning Fulton & Skinner PA, Raleigh
- John R. Cella Jr., Ward & Smith PA, Raleigh
- Andrea C. Chomakos, McGuireWoods LLP, Charlotte
- Stephanie C. Daniel, Smith Moore Leatherwood LLP, Charlotte
- Elinor J. “Elie” Foy, Wyrick Robbins Yates & Ponton, Raleigh
- Rick E. Graves, Graves May PLLC, Wilmington
- Linda F. Johnson, Senter Stephenson & Johnson PA, Fuquay-Varina
- Timothy W. Jones, Jones Branz & Tarsitano LLP, Raleigh
- Jill L. Peters Kaess, Smith Moore Leatherwood LLP, Wilmington
- Heidi E. Royal, Foster Royal PA, Charlotte
- N. Lucille “Lucy” Siler, Johnston Allison & Hord PA, Charlotte
- Rebecca L. Smitherman, Craig Jenkins Liipert & Walker LLP, Winston-Salem
- Sandi O. Thorman, CPA, GreerWalker, Charlotte
- Bradley T. Van Hoy, Moore & Van Allen PLLC, Charlotte
- Jason W. Wenzel, Narron O’Hale Whittington PA, Smithfield

We extend our sincere gratitude to the NCBA Estate Planning & Fiduciary Law Section and the planners and speakers who volunteer their time and expertise toward the goal of presenting an educational program of the very highest quality.

Hotel Information

Contact hotels directly for reservations at the special NCBA room rate. Rates are based on availability and may sell out.

- Embassy Suites, 201 Harrison Oaks Boulevard, Cary
  Nightly Rate: $169 single/double. Includes evening manager’s reception and full, cooked-to-order breakfast
  Reservations: 919.677.1840 or www.tinyurl.com/NCBA-Embassy
  NCBA Corporate Account Special Rate Code: 2691626
  Please note: The rates may vary according to guest room availability.

- TownePlace Suites by Marriott, 120 Sage Commons Way, Cary
  Nightly Rate: $114 studio queen with sleeper sofa (Sunday–Thursday). Includes complimentary hot breakfast. All rooms have a fully equipped kitchen.
  Reservations: 919.678.0005 | Ask for the NC Bar Association corporate rate.
2017 Estate Planning and Probate Law Survey Course

LIVE • LIVE WEBCAST
Wednesday–Thursday, September 27–28, 2017
NC Bar Center, Cary

CLE CREDIT: 14.5 Hours
Qualifies for North Carolina State Bar Estate Planning and Probate Law Specialization credit

UPDATES & REGISTRATION
www.tinyurl.com/CLE501EPC

“I loved the topics, the speakers were very knowledgable, and I will use the materials as a reference to refine my legal skills in this area.”

“Complex area of law, but I’ll feel this course has given me reference materials to help me navigate what I can take on as a new practitioner in this area and what I need to refer to a more experienced lawyer.”

—Attendees, 2015 Estate Planning and Probate Law Survey Course