

NORTH CAROLINA  
BAR ASSOCIATION

seeking liberty + justice

# 2019 Estate Planning and Probate Law Survey Course



14.5  
HOURS

TOTAL CLE CREDIT

Qualifies for North  
Carolina State Bar Estate  
Planning and Probate Law  
Specialization credit

## LIVE and WEBCAST

Thursday–Friday

September 26–27, 2019

North Carolina Bar Center

8000 Weston Parkway

Cary

## REGISTER TODAY!

Save 10% if registration is

received by September 5, 2019.

[www.tinyurl.com/CLE750EPC](http://www.tinyurl.com/CLE750EPC)

## AVAILABLE FORMATS



## PROGRAM SUMMARY

The *2019 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. Written outlines are provided for each subject covered.

- North Carolina probate and trust law
- Federal transfer tax: estate, gift and generation-skipping transfer tax
- Planning with real estate, retirement and business interests
- Fiduciary income taxation

## WHAT PEOPLE ARE SAYING...



“Great lineup of speakers!”



“The practice points from the speakers along with the thorough overview was great for revealing the areas I need to study further.”



“The materials will be good to refer to later in practice.”

— Attendees, *2017 Estate Planning & Probate Law Survey Course*

# AGENDA

THURSDAY, SEPTEMBER 26, 2019 | 8:00 a.m. – 5:00 p.m.

8:00 **Registration and Continental Breakfast**

8:25 **Welcome and Introductions**

8:30 **North Carolina Law of Wills and Trusts**  
Nesbitt

10:00 **Break**

10:15 **Probate Law**  
Kilgore

11:15 **Gross Estate (Valuation of Gross Estate)**  
Cella

12:15 **Networking Lunch**

12:45 **Estate Planning with Powers of Attorney/Guardianship and Ward**  
Johnson

1:45 **Federal Transfer Tax: Estate, Gift and Generation-Skipping  
Transfer Tax (GST)**  
Daniel

2:45 **Break**

3:00 **Charitable Giving**  
Cadogan

4:00 **Drafting for Flexibility: Unwinding a Bad Plan**  
Van Hoy

5:00 **Adjourn**

# AGENDA

**FRIDAY, SEPTEMBER 27, 2019 | 8:00 a.m. – 4:30 p.m.**

8:00 **Continental Breakfast**

8:30 **Partnerships, LLCs and Corporation: Estate Planning and Probate Issues**  
Foy

9:30 **Life Insurance: Estate Planning and Business Succession**  
Trotter

10:30 **Break**

10:45 **Estate Planning Issues in the Modern Era**  
Adams and Kohut

11:45 **Fiduciary Law and Disputes**  
Barker

12:45 **Networking Lunch**

1:15 **The Intersection of Family Law and Estate Planning**  
Davis

2:15 **The Intersection of Elder Law and Estate Planning**  
Smith

3:15 **Break**

3:30 **Fiduciary Income Taxation of Trusts and Estates**  
Thorman

4:30 **Adjourn**

# PROGRAM DETAILS

## SPEAKERS

- **Abby L. Adams**, Kohut & Adams PA, Wilmington
- **Michael H. Barker**, McGuireWoods LLP, Richmond, VA
- **Ed Cadogan**, The Nature Conservancy, Alexandria, VA
- **John R. Cella Jr.**, Ward and Smith PA, Raleigh
- **Stephanie C. Daniel**, Shumaker Loop & Kendrick LLP, Charlotte
- **Jaime H. Davis**, Gailor Hunt Jenkins Davis Taylor & Gibbs, Raleigh
- **Elinor J. “Elie” Foy**, Womble Bond Dickinson (US) LLP, Raleigh
- **Linda Funke Johnson**, Senter Stephenson & Johnson, Fuquay-Varina
- **Samuel R. “BJ” Kilgore III**, The Van Winkle Law Firm, Asheville
- **Paula A. Kohut**, Kohut & Adams PA, Wilmington
- **Andrew L. Nesbitt**, Nesbitt Law PLLC, Charlotte
- **Aimee Smith**, Craige Jenkins Liipfert & Walker LLP, Winston-Salem
- **Sandi O. Thorman**, GreerWalker LLP, Charlotte
- **Michael J. Trotter**, TIAA, Charlotte
- **Bradley T. “Brad” Van Hoy**, Moore & Van Allen PLLC, Charlotte

## HOTEL INFORMATION

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

### Embassy Suites

201 Harrison Oaks Boulevard, Cary

- **Nightly Rate:** \$174 single/double
- **Reservations:** 919.677.1840 or [www.tinyurl.com/NCBA-Embassy](http://www.tinyurl.com/NCBA-Embassy)
- **Corporate Account Code:** 2691626

### TownePlace Suites by Marriott

120 Sage Commons Way, Cary

- **Nightly Rate:** \$114 studio queen with sleeper sofa (Sunday–Thursday)
- **Reservations:** 919.678.0005
- **Ask for the NCBA corporate rate.**

## PLANNERS

- **C. Barton “Bart” Landess**, Catawba Lands Conservancy, Charlotte
- **Kerri L.S. Mast**, Brown Brothers Harriman, Charlotte

## SPECIAL ACCOMMODATIONS

NCBA makes every effort to ensure a quality learning experience. If you have dietary restrictions or need special accommodations, please contact us at least one (1) week prior to the program start date.

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

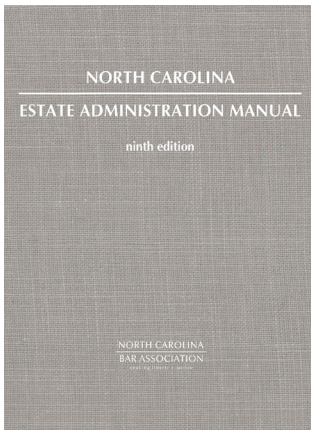
## RELATED INFORMATION

### North Carolina Estate Administration Manual, ninth edition

Considered the gold standard for North Carolina estate practitioners, this bestselling procedural guide continues to improve the quality of probate practice through the use of systematic and uniform procedures.

Along with legislative updates, pertinent case law and more than 185 essential forms, this comprehensive ninth edition is enhanced with new and expanded sections on the following key topics:

- Basis consistency reporting (IRS Form 8971) (New)
- Uniform Adult Guardianship and Protective Proceedings Jurisdiction Act (New)
- Standby guardianship (Expanded)
- "Living probate" (Expanded)
- Trust administration (Expanded)
- Comprehensive back-of-the-book index (New)



#### **Print & E-version**

Non-Member Price: \$430

NCBA Member: \$365

Estate Planning & Fiduciary Law Section Member: \$330

CLE Premier Pass: \$260

#### **E-version Only**

Non-Member Price: \$345

NCBA Member: \$280

Estate Planning & Fiduciary Law Section Member: \$245

CLE Premier Pass: \$196

# REGISTER TODAY!

**Online:** [www.tinyurl.com/CLE750EPC](http://www.tinyurl.com/CLE750EPC) | **By phone:** 800.228.3402

**By mail:** Attn: Accounting–NCBA, 8000 Weston Parkway, Cary, NC 27513

## STEP 1: Tell us who you are. (Please print clearly.)

Print Full Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State and ZIP: \_\_\_\_\_

Daytime Phone Number: \_\_\_\_\_

Email Address: \_\_\_\_\_

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

**STEP 2: Select your tuition rate.** (Register early and save 10%. Payment must be received three (3) weeks prior to program date to qualify for the early rate.)

**Standard Rate:**  \$730 /  \$655 *Early*

**NCBA Member:**  \$610 /  \$550 *Early*

**Estate Planning & Fiduciary Law Section Member:**  \$565 /  \$510 *Early*

**CLE Premier Pass:**  \$0

## STEP 3: Select your learning format.

Live (750EPC)  Webcast (750LWC)  Video Replay (See below.)

Video Replay registration (if selected).

Video Replays are scheduled for this program. The agenda may not include certain breakouts/tracks shown at the original program. For a list of dates and locations visit [www.tinyurl.com/CLE750EPC](http://www.tinyurl.com/CLE750EPC) and indicate your choice below.

Location: \_\_\_\_\_ Date: \_\_\_\_\_ Code: \_\_\_\_\_

## STEP 4: Complete your payment information.

(Registration is complete only after payment is processed. Please print clearly.)

I am registering for this program at the tuition rate checked above.

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

Card Number: \_\_\_\_\_ Exp. Date: \_\_\_\_\_

Total Amount: \_\_\_\_\_ Signature: \_\_\_\_\_

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Discounts may be available for NCBA members who are students, law professors, judges or legal services/public interest attorneys. Call CLE at 800.228.3402 for details.

# NCBA

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# 2019 Estate Planning and Probate Law Survey Course

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**REGISTRATION:** All registrations are processed after payment is received. To qualify for the early tuition rate, payment must be received prior to the deadline indicated. Stated early discount rate percentage is approximate. Registrations may be capped based on venue size and may include an overflow room with additional seating. **CHANGES TO EXISTING REGISTRATIONS:** Should an attendee need to cancel his or her registration to a Live, Webcast or Video Replay program, the cancellation request must be received by 9:00a ET one (1) week prior to the start of the program to receive a full refund. Any attendee requesting cancellation less than one week prior to the program will receive a refund, less a \$75 administrative fee. An attendee may choose to transfer his or her registration at a program to the Live, Webcast or Video Replay format of the same program only. Transfer requests must be received by 9:00a ET one (1) business day prior to the program start date. An attendee may further choose to substitute his or her registration to a Live or Video Replay program only. Substitution means sending another person to attend the Live or Video Replay program when the original registrant is unable to attend. Substitution requests must be received by 9:00a ET one (1) week prior to the program start date. The substituted person may be assessed a different fee based on their NCBA membership classification. Cancellation, transfer and substitution requests must be provided in writing by email at [askcle@ncbar.org](mailto:askcle@ncbar.org) or by calling 800.228.3402. If an attendee misses any portion of a program, that portion is not subject to substitution, refund or transfer. Except as provided herein, registrations, including On Demand registrations, cannot be canceled, substituted or transferred once purchased. **NO-SHOWS:** Anyone who is registered for a program, including CLE Premier Pass holders, but does not check in is considered a no-show. No-shows are not issued a refund, and Premier Pass holders will be assessed a \$75 administrative fee. These registrants will receive the digital materials, available in their online accounts, in full consideration of tuition paid. **MISCELLANEOUS:** The NCBA reserves the right to cancel or reschedule programs at any time. Should the NCBA cancel or reschedule a program, registrants may elect to receive a full refund or attend the newly scheduled program. Notifications regarding program changes will be sent to the email address on file. The NCBA is not responsible for any additional expenses incurred as a result of such cancellation or rescheduling. Each attorney must maintain a record of his or her attendance for the NC State Bar Annual Report. MCLE credit is reported by the NCBA only if a NC State Bar number is provided. Registration and attendance at NCBA CLE programs constitutes an agreement by the registrant with the NCBA for use and distribution of the attendee's image or voice in photographs, videotapes, electronic reproductions and audiotapes of such programs and activities. Unless specified, spouses or guests are not eligible to attend NCBA CLE programs and activities without registering to attend. These terms are subject to change.