

Registration:

Taxation, Probate & Trust Law Section

- Member.....\$350.00
- Non-Member.....\$400.00
- New Attorney (*Out of law school 3 years or less*).....\$300.00

Event Option

Welcome Reception

- Registrant (Included w/ registration)
- Guest(s).....\$10.00 *per guest*
Number of Guests _____

Name _____

ISB# _____ Firm _____

Address _____

City, State, Zip _____

Phone _____

Email _____

Make checks payable to and send completed form to:
Idaho State Bar, PO Box 895, Boise, ID 83701
or scan and email to dferrero@isb.idaho.gov.

TAX 15-40

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Presented by the

**Taxation,
Probate &
Trust Law
Section**

**2015 Annual
Estate Planning
Conference**

September 17-19, 2015

The Sun Valley Resort

1 Sun Valley Road - Sun Valley, ID

Lodging Reservations: (800)-786-8259

Room block ends August 17, 2015

**10.5 CLE credits
of which 0.5 is Ethics**

Thursday, September 17

6:00-8:00 p.m.

Welcome Reception

Corner Stone Bar & Grill
211 N. Main Street - Ketchum

Sponsored by the Taxation, Probate & Trust Law Section

Friday, September 18

7:30-8:30 a.m.

Continental Breakfast & An Economic Update

-0.5 CLE credits

Steve Scranton, *Washington Trust Bank*
Sponsored by Washington Trust Bank

8:30-10:00 a.m.

The 2% Floor - What Every Estate Planner Needs to Know About IRS Section 67(e)

-1.5 CLE credits

Domingo P. Such III, *Perkins Coie LLP*

10:00-10:20 a.m.

Morning Break

Sponsored by Idaho Trust Bank

10:20-11:50 a.m.

It's All About Trust: A Trustee Panel

Discussion - 1.5 CLE credits

Joseph Jones, *Attorney for Idaho Department of Finance*
A. Wesley Seideman, *TRESCO of Idaho*
Deb Moretto, *US Bank*
Doug Lamm, *CPA Nichols Accounting Group PC*
Moderator: John McGown, *Hawley Troxell*

Noon-1:15 p.m.

Hosted Lunch & Annual Section Meeting

-0.5 CLE credits

James A. Coates, *Ferguson Wellman Executive V.P.*
Ralph Cole, *Ferguson Wellman CFA / Executive V.P. of Research*
Sponsored by Ferguson Wellman

1:30-3:00 p.m.

What Every Estate Planner Needs to Know

About Selling a Business - 1.5 CLE credits of which 0.5 is Ethics

Lee B. Dillion, *University of Idaho College of Law*

3:00-3:20 p.m.

Ice Cream Social

Sponsored by Hall & Associates

3:30-5:00 p.m. - *Concurrent Sessions*

Complex Problems, Creative Solutions: Wealth Planning in Today's Environment

- 1.5 CLE credits

Thomas P. Pauloski, *Bernstein Global Management*
or **Idaho Probate 101: What You Need to Know** - 1.5 CLE credits

Sandra L. Clapp, *Sandra L. Clapp & Associates*

5:00-6:30 p.m.

Hosted Reception

Duchin Lounge

Sponsored by UBS Financial Services, Inc.

Saturday, September 19

7:30-8:30 a.m.

Continental Breakfast & Technical Aspects of Long-Term Care Insurance

- 0.5 CLE credits

Allison Tuszynski, *New York Life*

Sponsored by New York Life

8:45-10:15 a.m.

Life Insurance Basics for Estate Planners

- 1.5 CLE credits

Grant R. Markuson, *Markuson Law Group*

10:15-10:30 a.m.

Morning Break

Sponsored by TRESCO

10:30 a.m.-Noon

Federal Tax Update

- 1.5 CLE credits

Mike Blackburn, *Blackburn & Stoll*

Noon

Seminar Concludes

Continuing Legal Education Credit:

It is the responsibility of each attorney to maintain records of attendance for the 3 year CLE reporting period required by the Idaho State Bar.

Tax Deductible:

Tuition, travel and living expenses for attending CLE programs are deductible for federal tax purposes. See *Coughlin v. Commissioners*, 203 F.2d 307 (2d Cir. 1953); *Treas. Reg. 1.162-5*. However, Internal Revenue Service Section 274 may limit the deductibility of food, beverage and entertainment expenses to 50% of cost.

Registration Policy:

Pre-registration is accepted until 24 hours in advance of the program. Late registration is accepted as space allows and for an additional \$5.00 fee.

Cancellation Policy:

Registrations may be canceled without charge if a cancellation request is received at least 48 hours in advance of the program. A \$10.00 administrative fee will be charged if a registration is cancelled less than 48 hours prior to the program. Contact Dayna Ferrero at dferrero@isb.idaho.gov or (208) 334-4500 to cancel your registration.

Special Accommodations:

Please notify the Member Services Department in advance of the seminar date if you require special accommodations in order to attend.

Additional Information:

For more information, call or write to the Member Services Department, Idaho State Bar, PO Box 895, Boise, ID 83701; phone: (208) 334-4500; or email: dferrero@isb.idaho.gov.

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