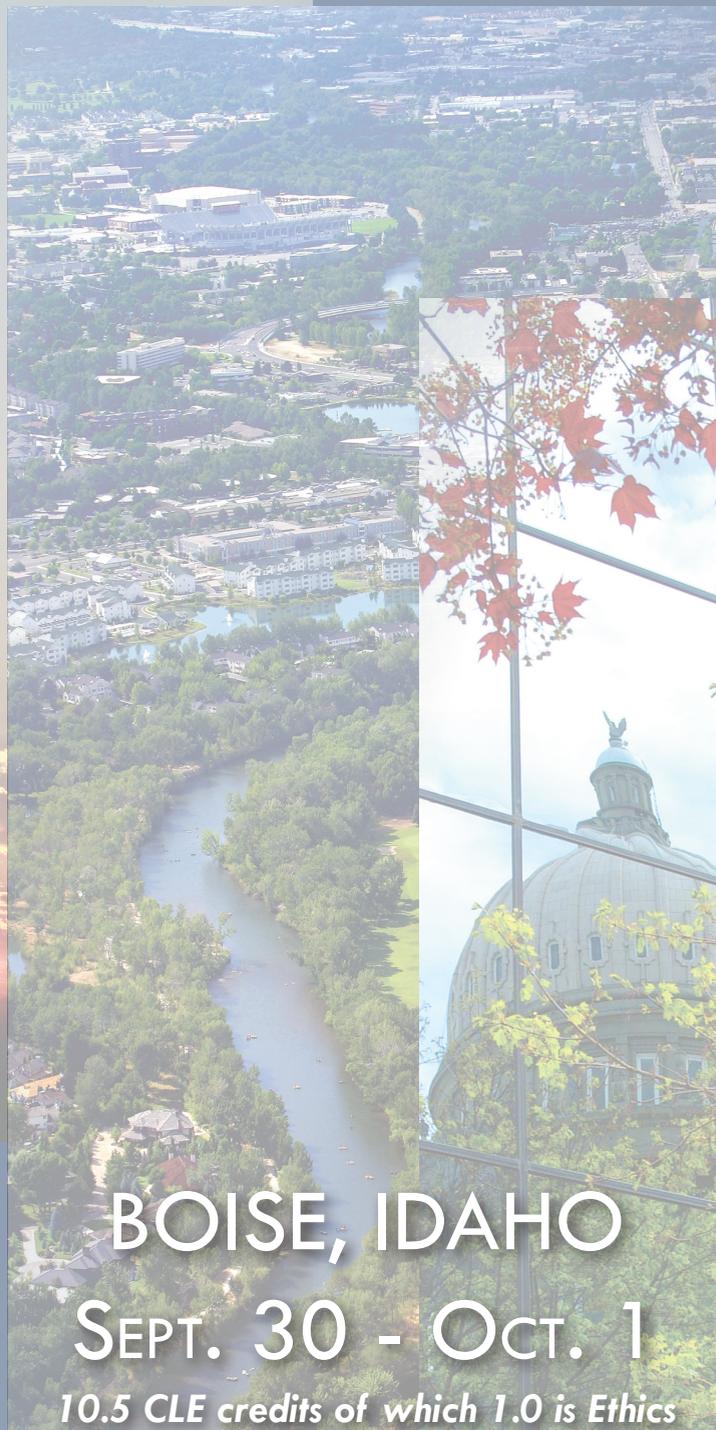


# 2016 ESTATE PLANNING CONFERENCE



BOISE, IDAHO

SEPT. 30 - OCT. 1

*10.5 CLE credits of which 1.0 is Ethics*

*The Riverside Hotel  
2900 W. Chinden Blvd.  
Room block available with discounted rates.  
Call 208-343-1871.*

# 2016 Estate Planning Conference Schedule of Events

## Thursday, September 29

6:00 p.m. - 8:00 p.m. Reception - *Sponsored by University of Idaho Office of Estate, Trust & Gift Planning*

## Friday, September 30

7:30 a.m. - 8:30 a.m. Seated Breakfast - *Sponsored by Washington Trust Bank*  
Demographics: Understanding Their Impact on the U.S. Economy and Financial Markets - *0.5 CLE Credits*  
Speaker: Steve Scranton, *Spokane, WA*

8:45 a.m. - 10:15 a.m. Safeguarding the Estate Plan to Anticipate & Avoid Litigation - *1.5 CLE Credits*  
Speaker: Stacie Nelson, *San Francisco, CA*

10:15 a.m. - 10:30 a.m. Morning Break - *Sponsored by Idaho Trust Bank*

10:30 a.m. - 12:00 p.m. Arming the Estate Plan: Planning for the Distribution of Firearms - *1.5 CLE Credits*  
Speaker: Alex Kincaid, *Boise, ID*

12:15 p.m. - 1:15 p.m. Lunch - *Sponsored by Ferguson Wellman Capital Management*  
Third-Quarter Investment Outlook for 2016 - *0.5 CLE Credits*  
Speaker: James A. Coates, *Portland, OR*

### Concurrent Sessions

1:30 p.m. - 3:00 p.m. What Every Idaho Attorney Should Know About Delaware Trusts - *1.5 CLE Credits*  
Speaker: Anne-Marie Levin, *Wilmington, DE*

### **OR**

1:30 p.m. - 2:30 p.m. Elder Law, Medicaid and VA Benefits: What Every Estate Planner Should Know - *1.0 CLE Credits*  
Speaker: David Wilson, *Boise, ID*

### **AND**

2:30 p.m. - 3:00 p.m. Advanced Care Directives 101 (Part I) - *0.5 CLE Credits*  
Speaker: Stephanie Bender-Kitz, *Boise, ID*

3:00 p.m. - 3:30 p.m. Afternoon Break - *Sponsored by Dalton Bahney Treinen Wealth Management Group*

### Concurrent Sessions

3:30 p.m. - 5:00 p.m. Federal Tax Update - *1.5 CLE Credits*  
Speaker: Michael Blackburn, *Salt Lake City, UT*

### **OR**

3:30 p.m. - 4:00 p.m. Advanced Care Directives 101 (Part II) - *0.5 CLE Credits*  
Speaker: Stephanie Bender-Kitz, *Boise, ID*

### **AND**

4:00 p.m. - 5:00 p.m. Trust Administration 101 - *1.0 CLE Credits*  
Speaker: David Cooper, *Boise, ID*

5:00 p.m. - 6:30 p.m. Reception - *Sponsored by Northwestern Mutual*

## Saturday, October 1

7:30 a.m. - 8:30 a.m. Seated Breakfast - *Sponsored by The Idaho Community Foundation*  
Planning to Give: Incorporating Charitable Giving Into the Estate Plan - *0.5 CLE Credits*  
Speaker: Karen Bilowith, *Boise, ID*

8:45 a.m. - 10:15 a.m. Let's All Get Along: How to Use the Trust & Estate Dispute Resolution Act to Resolve Conflicts in Estate & Trust Administration - *1.5 CLE Credits*  
Speaker: Stephen Pruss, *Seattle, WA and Boise, ID*

10:15 a.m. - 10:30 a.m. Morning Break - *Sponsored by TRESKO of Idaho*

10:30 a.m. - 12:00 p.m. The New World of Conservatorships & Guardianships in Idaho: A Perspective from the Bench & Bar - *1.5 CLE Credits of which 1.0 is Ethics*  
Speakers: Hon. Christopher Bieter, *Boise, ID*; and Robert Aldridge, *Boise, ID*

12:00 p.m. Conference Adjourns

# 2016 Annual Estate Planning Conference

## Registration Form

Connect with  
Idaho State Bar



- Taxation, Probate & Trust Law  
Section Member.....\$350.00
- Non-Section Member.....\$400.00
- New Attorney (Out of law school 3 years or less)....\$300.00
- Law Student.....\$50.00

### Course Material Option

- USB Thumb Drive  
**OR**
- Hard Copy

### Thursday Night Reception

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

### Friday Night Reception

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

Registration Total \_\_\_\_\_ + Event Total \_\_\_\_\_ = **Total Due \$** \_\_\_\_\_

### Registration Information

Name: \_\_\_\_\_

ISB#: \_\_\_\_\_ Firm: \_\_\_\_\_

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

City, State, Zip: \_\_\_\_\_

Phone: \_\_\_\_\_

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

### Payment Information

Make checks payable to and send completed form to:  
Idaho State Bar, PO Box 895, Boise, ID 83701  
Fax: (208) 334-4515

#### Method of Payment:

- Cash
- Check
- VISA
- MasterCard

TAX 16-60

Cardholder's Name (As Imprinted on the card):

Acct.# \_\_\_\_\_

Exp. Date \_\_\_\_\_ Amt. \_\_\_\_\_

Signature \_\_\_\_\_

# *Special thanks to our 2016 sponsors!*

## **DIAMOND**

*Ferguson Wellman Capital Management  
University of Idaho Office of Estate, Trust & Gift Planning*

## **PLATINUM**

*Northwestern Mutual*

## **GOLD**

*Key Bank  
Idaho Community Foundation  
Washington Trust Bank*

## **SILVER**

*Dalton Bahney Treinen Wealth Management Group*

## **BRONZE**

*Idaho Trust Bank  
TRESKO of Idaho*

