



2018 Annual Estate Planning Conference

boise, idaho

September 20 - 21, 2018

The Grove Hotel • 245 S. Capitol Blvd.

10.5 CLE Credits

Sponsored By



2018 Estate Planning Conference Schedule of Events

Thursday, September 20

12:00 p.m.	Registration
12:30 p.m. - 1:30 p.m.	Hosted Lunch / Program - Sponsored by Idaho Trust Bank A Day in the Life of a Special Needs Trust Beneficiary: Real Life Decisions for Individuals with Special Needs <i>Jeremy Parkinson, Idaho Trust Bank</i>
1:30 p.m. - 3:00 p.m.	Saving Your Clients' Retirement Ass[ets]... Recent Developments in Estate Planning for Retirement Benefits <i>Robert Kirkland, Kirkland Woods & Martinsen LLP</i>
3:00 p.m. - 3:30 p.m.	Afternoon Break - Sponsored by Key Bank
3:30 p.m. - 5:00 p.m.	Top Ten Ways Tax Simplification Has Made Estate Planning More Complex (and More Interesting) <i>Nicholas S. Marshall, Ahrens DeAngeli Law Group LLP</i>
5:00 p.m.	Hosted Reception

Friday, September 21

8:00 a.m. - 9:15 a.m.	Hosted Breakfast / Program - Sponsored by Washington Trust Bank Ignore the Noise of Politics and Focus on the Fundamentals of the Economy <i>Steve Scranton, Washington Trust Bank</i>
9:15 a.m. - 10:45 a.m.	Business Transition Planning - Sponsored by Key Private Bank <i>Michael Ella, Key Private Bank</i>
10:45 a.m. - 11:00 a.m.	Morning Break - Sponsored by U.S. Bank
11:00 a.m. - 12:30 p.m.	Artificial Intelligence and the Law: The End, or the Beginning? <i>Robert J. Green, Kootenai Law Group, PLLC</i>
12:30 p.m. - 1:30 p.m.	Hosted Lunch / Program - Sponsored by Ferguson Wellman Investment Outlook <i>Jim Coats, Ferguson Wellman</i> <i>Jason Norris, Ferguson Wellman</i>
1:30 p.m. - 3:00 p.m.	Concurrent Sessions Medicaid Recovery: Whistling Past the Graveyard <i>W. Corey Cartwright, Office of the Idaho Attorney General</i> OR Claiming Social Security Benefits in 2018 After the Bipartisan Budget Act of 2015 <i>Robert A. Wreggelsworth, U.S. Bank</i>
3:00 p.m. - 3:30 p.m.	Afternoon Break - Sponsored by the University of Idaho Office of Estate, Trust and Gift Planning
3:30 p.m. - 5:00 p.m.	Federal Tax Update <i>Samuel A. Donaldson, Georgia State University</i>
5:00 p.m.	Conclusion of 2018 Annual Estate Planning Conference

2018 Annual Estate Planning Conference

Registration Form

Connect with
Idaho State Bar



- ☐ Taxation, Probate & Trust Law
Section Member.....\$300.00
- ☐ Non-Section Member.....\$350.00
- ☐ New Attorney (Admitted into the
Idaho State Bar less than five (5) years).....\$300.00
- ☐ Law Student.....\$25.00

Thursday Reception

- ☐ I plan to attend (included in registration)
- ☐ Guest (\$15 each)
Number of Guests _____

Meal Options

- ☐ Regular ☐ Vegetarian

Course Material Option

- ☐ USB Thumb Drive
OR
☐ Hard Copy

Registration Total _____

+ Guest Fees _____

= 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

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

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GOLD

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University of Idaho Office of Estate, Trust and Gift Planning

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Lodging:

Call The Grove Hotel at (888) 961-5000 and mention "ID State Bar - Annual Advanced Estate Planning Conference" to receive the negotiated room rates. Available through August 29.