



2019
Annual
Estate Planning
Conference

boise, idaho

September 19 - 20, 2019

The Grove Hotel · 245 S. Capitol Blvd.

10.5 CLE Credits

Sponsored By



2019 Estate Planning Conference Schedule of Events

Thursday, September 19

- 8:00 a.m. - 9:00 a.m. **Hosted Breakfast / Program** - Sponsored by Idaho Trust Bank
Top Three Fiduciary Mistakes and How to Help Clients Avoid Them
Corey Smith, JD, MSAT, Idaho Trust Bank
- 9:00 a.m. - 10:30 a.m. **Using Tools in Our Daily Toolbox for Asset Protection Objectives**
Robert K. Kirkland, Kirkland Woods & Martinsen LLP
- 10:30 a.m. - 10:45 a.m. **Break**
- 10:45 a.m. - 12:15 p.m. **Who Knew? Time-Saving, Practicing-Saving Hacks in the Uniform Probate Code**
Moderator: Dennis S. Voorhees, Canyon River Law LLP
Panelists TBD
- 12:15 p.m. - 1:15 p.m. **Hosted Lunch / Program** - Sponsored by Ferguson Wellman Capital Management
Macro Economics Update
Jim Coats, Ferguson Wellman Capital Management
Jason Norris, Ferguson Wellman Capital Management
- 1:15 p.m. - 3:00 p.m. **Planning with Life Insurance**
Christopher Cline, Riverview Trust Company
- 3:00 p.m. - 3:30 p.m. **Break**
- 3:30 p.m. - 5:00 p.m. **Trust Litigation Issues: Three Case Studies**
Cam McGillivray, Northwest Trustee & Management Services, LLC
Steve Trefts, Northwest Trustee & Management Services, LLC
- 5:00 p.m. **Reception** - Sponsored by Columbia Trust Company

Friday, September 20

- 8:00 a.m. - 9:15 a.m. **Hosted Breakfast / Program** - Sponsored by Washington Trust Bank
Trust Administration Challenges: A Corporate Trustees' Perspective
Rob Blume, Washington Trust Bank
- 9:15 a.m. - 10:45 a.m. **Estate Planning for Family Farms**
Stephen L. Pruss, Ahrens DeAngeli Law Group LLP
- 10:45 a.m. - 11:00 a.m. **Break**
- 11:00 a.m. - 12:30 p.m. **Federal Tax Update**
Professor Sam A. Donaldson, Georgia State University College of Law
- 12:30 p.m. **Conference Adjourns**

2019 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
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Special thanks to our 2019 sponsors!

DIAMOND

*Ferguson Wellman Capital Management
Idaho Trust Bank
Washington Trust Bank*

GOLD

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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 19.*