THE ANNUAL ESTATE PLANNING SEMINAR

NOVEMBER 12-13, 2018 / SEATTLE, WA
The Estate Planning Council of Seattle and the University of Washington School of Law are pleased to present the 63rd Annual Estate Planning Seminar. The seminar is designed to educate and inform attendees on a variety of estate planning topics that are relevant today. Please join us and our nationally-recognized faculty at the seminar this year!

Largest Estate Planning Seminar in the United States
20 Presentations on various present-day topics
25 Presenters from across the United States
861 Attendees at last year’s seminar
Monday, November 12, 2018

8:00 a.m. Welcome and Introductions by Seminar Chair Scott Wallace
Perkins Coie LLP | Seattle, WA

8:10 a.m. Federal Tax Update
Samuel A. Donaldson
Georgia State University College of Law | Atlanta, GA

10:35 a.m. Estate Planning in Anticipation of a Contest or a Difficult Beneficiary
S. Andrew Pharies
DLA Piper | San Diego, CA

12:35 p.m. Presentation: Inheritance Law in Ancient Rome
Hugh Spitzer
UW School of Law | Seattle, WA

2:35 p.m. Estate Planning Using Family Limited Liability Entities in 2018 and Beyond
Elaine M. Gagliardi
University of Montana Alexander Blewett III School of Law | Missoula, MT

5:00 p.m. Adjournment

Tuesday, November 13, 2018

8:00 a.m. Opening Remarks
Ford Clary
U.S. Trust, Bank of America Private Wealth Management | Seattle, WA

8:05 a.m. Washington Probate and Trust Law Update
Mark Atkins | Hall Estill LLP | Seattle, WA

9:05 a.m. Estate Planning in the Age of Large Exclusions and Under the 2017 Tax Act Umbrella
Steve R. Akers
Bessemer Trust | Dallas, TX

2:40 p.m. BREAKOUT SESSION 2

Track 1 – Estate Planning for Potentially Vulnerable Clients: Taking a Closer Look
Karen R. Bertram | Kutscher Hereford Bertram Burkart PLLC | Seattle, WA
Janet Somers | Somers Tamblyn Isenhour Bleck | Seattle, WA
Page Ulrey | King County Prosecutor’s Office | Seattle, WA

Track 2 – Oregon Update: Legislation, Cases, Ethics & Malpractice
Philip N. Jones | Duffy Kekel LLP | Portland, OR

Track 3 – Update on Special Needs Trust Issues and Requirements
Sean Bleck | Somers Tamblyn Isenhour Bleck | Seattle, WA

3:40 p.m. Break

4:00 p.m. BREAKOUT SESSION 3

Track 1 – Planning for Closely Held Business Interests in WA: Section 8616 Deferral and the Washington Qualified Family-Owned Business Deduction
Brett Knudson | Perkins Coie LLP | Seattle, WA

Track 2 – Estate Planning for Washingtonians: Planning in the Land that the High Federal Exemption Forgot
A. Paul Firuz | Kutscher Hereford Bertram Burkart PLLC | Seattle, WA

Track 3 – The Economics of Charitable Remainder Trusts
Christopher F. Cline | Riverview Asset Management & Trust Company | Vancouver, WA

5:00 p.m. Adjournment

Track 1 – Crypto-Philanthropy: Virtual Currency and the Future of Charitable Giving
Jon Feldhammer | Perkins Coie LLP | San Francisco, CA

Track 2 – Oregon Update: Legislation, Cases, Ethics & Malpractice
Philip N. Jones | Duffy Kekel LLP | Portland, OR

Track 3 – Update on Special Needs Trust Issues and Requirements
Sean Bleck | Somers Tamblyn Isenhour Bleck | Seattle, WA

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5:00 p.m. Adjournment
Application will be made for 14.5 CLE credits for Washington attorneys. Application will also be made for other states and additional professions. Accreditation information will be updated on our website (www.seattleestateplanningseminar.com) as it becomes available.

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Thank you for registering to attend the 63rd Annual Estate Planning Seminar. You will need to complete a separate registration form for each individual attending. If you have any questions about registration, please contact EstatePS@uw.edu

Ways to Register
Online: seattleestateplanningseminar.com
Mail (checks only):
UW School of Law
Graduate Program in Taxation
Box 353020
Seattle, WA 98195

Payment Information
- Check enclosed payable to “UW School of Law” (credit card payments can only be accepted via online registration)
- Cancellation fee is $75
- Refunds will not be given after October 26, 2018
- Substitutions are possible; please contact EstatePS@uw.edu

Dietary Restrictions
Please list

Seminar Registration Costs:
- $499 EARLY REGISTRATION WITH ELECTRONIC COURSEBOOK (ON OR BEFORE SEPTEMBER 6, 2018)
- $549 EARLY REGISTRATION WITH PRINTED COURSEBOOK (ON OR BEFORE SEPTEMBER 6, 2018)
- $549 REGISTRATION WITH ELECTRONIC COURSEBOOK
- $599 REGISTRATION WITH PRINTED COURSEBOOK

Register here: registration.uw.edu/lawschool/estateplanningseminar.php
CONTINUING EDUCATION CREDIT FORM

Please choose all that apply:

- ACCOUNTANT
- ATTORNEY
- CERTIFIED FINANCIAL PLANNER (CFP)
- CERTIFIED PROFESSIONAL GUARDIAN
- CERTIFIED TRUST AND FINANCIAL ADVISOR (CTFA)
- INSURANCE PROVIDER
- PARALEGAL

Please fill in any applicable information below:

BAR STATE (1)  BAR NUMBER (1)
BAR STATE (2)  BAR NUMBER (2)
BAR STATE (3)  BAR NUMBER (3)
BAR STATE (4)  BAR NUMBER (4)
ACCOUNTING STATE (1)  ACCOUNTING LICENSE NUMBER (1)
ACCOUNTING STATE (2)  ACCOUNTING LICENSE NUMBER (2)
INSURANCE STATE  INSURANCE NUMBER
CFP NUMBER  CTFA NUMBER

ABOUT THE HOSTS

THE ESTATE PLANNING COUNCIL OF SEATTLE
One of the primary missions of our organization is to inform the public on estate planning matters and issues that confront us all. Our website - www.epcseattle.org - gives you access to unbiased information about estate tax-planning strategies, wills, trusts, business succession, and other topics that impact your personal estate plan. The Council is composed of local attorneys, CPAs, trust officers, insurance professionals, financial planners, and members of the planning community whose professional careers have all been centered around helping individuals achieve their estate planning goals.

THE UNIVERSITY OF WASHINGTON
SCHOOL OF LAW
UNIVERSITY OF WASHINGTON

THE UNIVERSITY OF WASHINGTON SCHOOL OF LAW TAX PROGRAM
The program is dedicated to providing students with a solid foundation in the technical aspects of tax law. Our program is designed to teach the necessary skills for innovative tax planning in all areas — federal, state, and local taxation; international taxation; and estate, trust and gift taxation. Our mission is to offer a comprehensive curriculum that prepares students to succeed in whichever practice they choose.

LODGING

We have contracted with the hotels below for a limited number of rooms at a reduced seminar rate. Online reservation links are available on our website: seattleestateplanningseminar.com

SHERATON SEATTLE HOTEL
888-627-7056
Group Code: 63rd Annual Estate Planning Seminar
1600 6th Avenue | Seattle, WA 98101
Rates begin at $189 + taxes per night
Seminar Rate Cut-Off: Monday, October 15, 2018

THE PARAMOUNT HOTEL SEATTLE
877-821-2011
Group Code: 63rd Annual Estate Planning Seminar
724 Pine Street | Seattle, WA 98101
Rates begin at $192 + taxes per night
Seminar Rate Cut-Off: Thursday, October 11, 2018 @ 5pm

HOTEL THEODORE
886-986-8087
Group Code: 63rd Annual Estate Planning Seminar
1531 7th Avenue | Seattle, WA 98101
Rates begin at $169 + taxes per night
Seminar Rate Cut-Off: Thursday, October 11, 2018 @ 5pm

INN AT THE WAC
206-464-3055; 800-275-3775; innreservations@wac.net
Group Code: 63rd Annual Estate Planning Seminar
1325 Sixth Avenue | Seattle, WA 98101
Rates begin at $169 + taxes per night
Seminar Rate Cut-Off: Thursday, October 11, 2018 @ 5pm
NOVEMBER 12-13, 2018/SEATTLE, WA
WASHINGTON STATE CONVENTION CENTER

SEMINAR COSTS:
Early registration is on or before September 6, 2018

$499 Early registration with electronic coursebook

$549 Early registration with printed coursebook

$549 Registration with electronic coursebook

$599 Registration with printed coursebook

WEBSITE:
www.seattleestateplanningseminar.com