

# Table of Contents for 36<sup>th</sup> Annual Advanced Estate Planning and Probate Course

<b>Case Law Update</b> Gerry W. Beyer	<b>1</b>
<b>Trustee Disclosure</b> ( <i>Biographies Only</i> )	<b>2</b>
<b>The Fiduciary Duty of Full Disclosure: Knowing When and What to Disclose</b> Jeff T. Knebel Jason Scott	
<b>Fiduciary Duty to Disclose</b> Laurie Ratliff	
<b>Corporate Fiduciary Disclosure Survey Results</b> Glenn M. Karisch	
<b>To Apply for Guardianship or Not –Where is the Edge?</b> Sarah Patel Pacheco	<b>3</b>
<b>Choice of Entity: Issues for Estate Planners</b> David P. Dunning Michael V. Bourland Kenneth L. Wenzel Dustin G. Willey	<b>4</b>
<b>Planning For Digital Assets</b> Naomi Cahn	<b>5</b>
<b>Property Taxes and Title Insurance: Issues and Answers for the Estate Lawyer</b> Michael A. Wren	<b>6</b>
<b>Creditors' Claims in Dependent and Independent Administrations</b> M. Keith Branyon	<b>7</b>
<b>Planning in a Cross Border World: Global Families and Domestic Policies Collide</b> Gavin F. Leckie	<b>8</b>
<b>What Texas Lawyers Need to Know About Louisiana Law</b> W. Deryl Medlin	<b>9</b>
<b>Tax Law Update</b> Stanley M. Johanson	<b>10</b>
<b>Estate Planning Issues with Intra-family Loans</b> Stephen R. Akers	<b>11</b>
<b>New Rules in an Independent Administration and How to Deal With Them</b> C. Boone Schwartzel	<b>12</b>
<b>Decanting Irrevocable Trusts</b> Melissa J. Willms	<b>13</b>

# Table of Contents for 36<sup>th</sup> Annual Advanced Estate Planning and Probate Course

<b>The Power to Appoint and Disappoint: Anatomy of Powers of Appointment</b> Gene Wolf	14
<b>Application of Collaborative Law Procedures to Will, Probate, Trust, and Guardianship Disputes</b> Harry L. Munsinger	15
<b>Privilege Issues in the Estate Planning Arena</b> Stephanie Loomis-Price	16
<b>Current Issues Related to Estate Planning with Qualified Retirement Plans and IRAs</b> Karen S. Gerstner	17
<b>Beneficiary Defective Trusts: Drafting the Dream Trust</b> Lora Gayle Davis	18
<b>Business Succession Planning</b> Louis A. Mezzullo	19
<b>Transfer Planning in 2012 and Beyond-- Use It Before You Lose It: Efficient and Effective Use of the \$5 Million Dollar Gift Tax Exemption</b> Steve R. Akers	20
<b>Farm and Ranch Properties – Family Legacy or Liability?</b> David Braun Susan Kathryn Armstrong Bruce Thomas Morrison	21
<b>Options For Closing The Estate Administration: What They Are And When They Should/Should Not Be Used</b> Sarah Patel Pacheco	22
<b>The Top Ten Things An Estate Planner Should Know About Elder Law</b> Molly Dear Abshire	23
<b>Proposed Uniform Power of Attorney Act</b> Craig S. Adams Frank Z Ruttenberg Donald L. Totusek	24
<b>Fiduciary Duties within Fiduciary Duties Trust Owning Stock in a Closely-Held Corporation</b> Mary C. Burdette	25
<b>Top Ten Things to Take Away</b> <i>(No Article/Biographies Only)</i>	26
<b>A Topical Guide</b> Jerry Frank Jones	