PROBATE, ESTATE & TAX

TRACK CHAIRS:

Robin Miskell
Snell & Wilmer LLP

Sarah Singer
Gadarian & Cacy PLLC

A Motley Mix of Probate, Estate Planning, and Tax – What's Not to Like?

Co-sponsored by the State Bar of Arizona Probate and Trust Law and Tax Law Sections

The Good, The Bad, The Ugly: Probate, Estate Planning, and the World of Guardianship/Conservatorship

Friday 8:15 am – 12:30 pm

When administering estates and trusts, every practitioner needs to be prepared to address conflicts in all shapes and sizes. Come ready to share your experience and join an interactive discussion about estate and trust administration.

- Learn from experienced practitioners what to do and what not to do based on real-life examples in probate, trust, and estate administration and guardianship/conservatorship.
- Learn why you might use arbitration and mediation clauses in wills and trusts, and how they work.
- Get an update on the most recent and interesting case law in Arizona and the status of the proposed Arizona domestic asset protection trust ("DAPT") legislation.

Let's Get Technical

Come one, come all! Join us for an in-depth review and discussion about popular tax planning concepts

Saturday 8:15 am – 12:30 pm

This session takes a deep dive into several important tax topics, including Subchapter J, Beneficiary Deemed Owner Trusts ("BDOTs"), and IRS audits.

- Ed Morrow, a nationally renowned speaker, author, and practitioner, will discuss BDOTs and why you might want to have this type of trust in your arsenal (or at least be aware of such trusts), thanks to their tax benefits.
- Learn from the accomplishments and mistakes of others and their stories of IRS Audit triumphs and tragedies.
- What every lawyer (not just estate planning and probate lawyers) needs to know about Subchapter J.

Beneficiary Designations, Asset Protection, and Retirement Planning

Sunday 8:15 am – 12:30 pm

This session addresses topics you may not have used in your practice yet, but after learning about them, you will be excited to start!

- Ed Morrow will discuss planning opportunities using beneficiary designations for spouses and for asset protection.
- Review Internal Revenue Code Subchapters J, K, and S updates (and what does that alphabet soup even mean?).
- Learn how to be the life of your next happy hour with Roth IRA Conversions and Self-Directed IRA tips and tricks.

FACULTY:

Giselle Alexander, *Wiggam & Geer*; Gary Fletcher, *Nystedt & Fletcher PLLC*; Gregory Gadarian, *Gadarian & Cacy PLLC*; Derek Kaczmarek, *Kaczmarek & Jojola, PLLC*; Jennifer Kupiszewski, *Mazza Law PLC*; Robin Miskell, *Snell & Wilmer LLP*; Edwin Morrow III, *Huntington National Bank*; TJ Ryan, *Frazer Ryan Goldberg & Arnold LLP*; Sarah Singer, *Gadarian & Cacy PLLC*

This program track may qualify for up to 12.0 hours MCLE. All 12.0 hours of MCLE may qualify for Estate & Trust Law Specialization, and 8.0 hours of MCLE may qualify for Tax Law Specialization.