

## ESTATE PLANNING CONFERENCE

December 3 – 4, 2009 • Pan American Life Center  
601 Poydras St., 11th Floor, Auditorium • New Orleans, Louisiana 70130

## REGISTRATION

**ONLINE:** law.loyno.edu/cle  
**FAX:** (504) 861-5573  
**PHONE:** (504) 861-5441  
**MAIL:** Loyola CLE, 7214 St. Charles Avenue,  
Box 905, New Orleans, LA 70118-3538

Name  Mr.  Ms.

Company/Firm

Address

City State Zip

Phone Fax

E-mail\*

\* Loyola University New Orleans does not sell e-mail addresses.

Bar Number State

Profession, if non-attorney

Special Needs

- \$395 Full Tuition
- \$375 Loyola law alumni; government/nonprofit employees
- \$250 One day only  Thursday  Friday
- \$50 Professionalism only (Thursday, 3:30 p.m.)
- \$50 Ethics only (Friday, 3:30 p.m.)
- \$75 Course materials only

## PAYMENT

Check enclosed payable to **LOYOLA CLE** \$

Please charge my  

We do not accept American Express or Discover credit cards.

Credit Card No.

Expiration Date

Name on Card

\*To review our registration and cancellation policy, please visit our website  
<http://law.loyno.edu/cle>

**FOR FURTHER INFORMATION**, call (504) 861-5441,  
(866) 250-8617 toll-free, or e-mail [clelaw@loyno.edu](mailto:clelaw@loyno.edu)

Nonprofit  
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New Orleans, LA



College of Law  
7214 St. Charles Avenue, Box 905  
New Orleans, LA 70118-3538

### UPCOMING PROGRAMS

**BACK TO SCHOOL ON SATURDAY MORNINGS**  
NOVEMBER 14 AND 21, AND DECEMBER 5, 2009

**SOCIAL SECURITY DISABILITY—HOW TO HANDLE YOUR CLIENT'S CASE**  
OCTOBER 23, 2009

**PRACTICAL APPLICATIONS OF FEDERAL AND STATE RULES OF EVIDENCE IN A COURTROOM SETTING**  
NOVEMBER 6, 2009

**ANNUAL FAMILY LAW CONFERENCE**  
DECEMBER 10 – 11, 2009

For further information, check out our web page at [law.loyno.edu/cle](http://law.loyno.edu/cle)  
E-mail us at [clelaw@loyno.edu](mailto:clelaw@loyno.edu)  
Toll Free (866) 250-8617 or (504) 861-5441

# ESTATE PLANNING

December 3 – 4, 2009  
Pan American Life Center  
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11th Floor, Auditorium  
New Orleans, Louisiana

## ANNUAL ESTATE PLANNING CONFERENCE

This course is approved for  
legal specialization in Tax  
Law and Estate Planning; as  
well as a FULL YEAR of CLE  
credits.

**LOYOLA  
UNIVERSITY  
NEW ORLEANS**

# ANNUAL ESTATE PLANNING CONFERENCE

DECEMBER 3 – 4, 2009

PAN AMERICAN LIFE CENTER

601 POYDRAS STREET, 11th FLOOR, AUDITORIUM

*The 2009 Loyola Estate Planning Conference features a distinguished panel of estate planning specialists that will review important recent developments in the area of new tax legislation, estate planning and elder care, and the use of life insurance in estate planning. Practical in approach, the program qualifies for 12.5 hours of continuing legal education credits, including ethics and professionalism. The program is approved for specialization credit in the areas of Tax and Estate Planning.*

*Don't delay, reserve your seat TODAY!*

## MCLE CREDIT

12.5 CLE credit hours including 1.0 hour of ethics and 1.0 hour of professionalism

Day One (Thursday) earns 6.25 hours, including

1.0 hour of professionalism

Day Two (Friday) earns 6.25 hours, including 1.0 hour of ethics

This program also qualifies for:

- Tax Law Specialization credit
- Estate Planning and Administration credit
- CPE credits for CPAs in Louisiana

## CANCELLATION

- Registration may be transferred.
- Cancellations must be received by Wednesday, November 19, 2009, to receive full refund.
- A \$75 cancellation fee will be assessed for cancellations received after November 19, 2009.
- Written materials will be mailed to registrants who do not cancel by conference date.

## PLANNING COMMITTEE

Michael E. Guarisco	Guarisco & Cordes, L.L.C., New Orleans, La.
David J. Lukinovich	Attorney at Law, Harahan, La.
Robert L. Perez	Perez, McDaniel & Faust, L.L.P., New Orleans, La.
Jerome J. Reso, Jr.	Baldwin Haspel Burke & Meyer, New Orleans, La.
Kenneth A. Weiss	McGlinchey Stafford, New Orleans, La.

## THURSDAY, DECEMBER 3, 2009

8 – 8:30 a.m.

### Registration

8:30 – 9:45 a.m.

### Recent Developments in Louisiana Law for the Estate Planning Attorney

#### Joseph W. Mengis

Perry, Atkinson, Balhoff, Mengis & Burns, L.L.C.

Baton Rouge, Louisiana

9:45 – 10 a.m.

### Break

10 – 11 a.m.

### Estate Planning and Elder Care

#### Joel A. Mendler

Sirote & Permutt

Birmingham, Alabama

11 a.m. – noon

### Long Tern Trusts: Drafting for Flexibility

#### Lawrence M. Lehmann

Lehmann Normann & Marcus, L.C.

New Orleans, Louisiana

noon – 1:15 p.m.

### Lunch on your own

1:15 – 2:15 p.m.

### The Delaware Advantage

#### David A. Diamond

Trusts & Estates, Private Wealth Management

J.P. Morgan

Chicago, Illinois

2:15 – 2:30 p.m.

### Break

2:30 – 3:30 p.m.

### New Tax Legislation

#### Robert L. Perez

Perez, McDaniel & Faust, L.L.P.

New Orleans, Louisiana

3:30 – 4:30 p.m.

(Professionalism)

### Professionalism and Estate Planning

#### Professor Dane Ciolino

Loyola University New Orleans

College of Law

New Orleans, Louisiana

## FRIDAY, DECEMBER 4, 2009

8 – 8:30 a.m.

### Registration

8:30 – 9:45 a.m.

### Recent Developments in Federal Gift and Estate Taxation

#### Jeffrey W. Koonce

Phelps Dunbar

Baton Rouge, Louisiana

9:45 – 10 a.m.

### Break

10 – 11 a.m.

### Current Valuation Issues

#### William Frazier

Howard Frazier Barker Elliott, Inc.

Dallas, Texas

11 a.m. – noon

### Comparison of Revocable Trust with Independent Administration Under Louisiana Law Including Privacy Issues

#### John A. Rouchell

Baldwin Haspel Burke & Mayer, L.L.C.

New Orleans, Louisiana

noon – 1:15 p.m.

### Lunch on your own

1:15 – 2:15 p.m.

### Use of Life Insurance in Estate Planning

#### Wayne E. Thomas

Thomas Financial Group

Metairie, Louisiana

2:15 – 2:30 p.m.

### Break

2:30 – 3:30 p.m.

### Income Taxation of Louisiana Estates and Trusts

#### Raymond P. Ladouceur

Ladouceur and Ladouceur, L.L.C.

New Orleans and Abita Springs, Louisiana

3:30 – 4:30 p.m.

(Ethics)

### Ethics

#### Bruce Spizer

David Bruce Spizer, A.P.L.C.

New Orleans, Louisiana

## A SPECIAL THANK YOU

*Loyola University College of Law wishes to thank the members of the planning committee as well as the speakers who volunteer their time and expertise to provide quality CLE programming.*