### DIGITAL RECORDINGS

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**Fiftieth Annual Notre Dame® Tax and Estate Planning Institute**

**Century Center – South Bend, Indiana – September 25th – 27th, 2024**

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**Wednesday September 25th, 2024**

**\_\_\_ Session 1**: *Greeting Jerome M. Hesch -* HOW TO USE FINANCIAL MODELING TO HELP YOUR CLIENTS AND YOURSELF

*Brad Dillon & Brandon Ketron*

**\_\_\_ Session 2:** AVOIDING MISTAKES IN TRUST ADMINISTRATION - *Martin Shenkman*

**Thursday September 26th, 2024**

**\_\_\_ Session 3:** Current Developments of Importance to Estate Planners - Turney Berry and Charles “Clary” Redd 1st hour

**Track A Sessions**

**\_\_\_ Session 4A:** PRACTICAL INCOME TAX PLANNING WITH YOUR ESTATE PLANNING FAMILY LIMITED PARTNERSHIP - *Robert Robes*

**\_\_\_ Session 5A:** A CHARITABLE GIFT ANNUITY PRIMER **-** *Larry Katzenstein*

**\_\_\_ Session 6A:** CREATIVE USES OF CHARITABLE REMAINDER TRUSTS - *Alan Gassman*

**\_\_\_** Session 7A: PLANNING FOR THE EXPECTED EXEMPTION SUNSET - *Kim Kamin*

**\_\_\_ Session 8A:** FIDUCIARY DUTIES WHEN EVALUATING LIFE INSURANCE PERFORMANCE ILLUSTRATIONS, PREMIUM FINANCING

PROPOSALS, AND MATCHING A POLICY TO AN INSURED’S OBJECTIVES - *Rebecca Rosofsky & Barry Flagg*

**Track B Sessions**

**\_\_\_ Session 4B:** FIDUCIARY INVESTMENT CONSIDERATIONS DEALING WITH A BUSINESS, CONCENTRATED STOCK

POSITIONS, ARTWORK, REAL ESTATE AND PRIVATE EQUITY - *Erica Lord*

**\_\_\_ Session 5B:** THE SECURE ACT AND SECURE ACT 2.0 - *Robert Kirkland*

**\_\_\_ Session 6B:** NEW FRONTIERS IN THE EXERCISE OF TRUSTEE DISCRETION: DUTIES OF THE TRUSTEE CONCERNING REQUESTS

FROM OR ON BEHALF OF A BENEFICIARY - *Beth Gansen Knight*

**\_\_\_ Session 7B:** SUBSTITUTE VS. SUPPORTIVE DECISION MAKING: OPTIONS AND POTENTIAL CONSEQUENCES

FOR CLIENTS WITH DIMINISHED CAPACITY - *Sandra Glazier*

**\_\_\_ Session 8B:** TRUST MODIFICATIONS AND TRUST TERMINATIONS: UNINTENDED TAX CONSEQUENCES AND HOW

TO AVOID THEM - *Ed Morrow & Paul Hood*

**Friday September 27th, 2024**

**Track A Sessions**

**\_\_\_Session 9A:** “YOU’RE FIRED: NO, I QUIT!” THE HOWS AND WHYS OF TERMINATING THE ATTORNEY-CLIENT RELATIONSHIP - *Bruce Ross* **\_\_\_Session 10A:** HIDDEN TRAPS USING CRUMMEY POWERS AND HOW TO ESCAPE THEM - *Sean Weissbart & Kyle Durante*

**\_\_\_Session 11A:** NAVIGATING CONFLICTS OF INTEREST AND OTHER ETHICAL MINEFIELDS WHEN REPRESENTING

MULTIPLE GENERATIONS - *Parker Taylor*

**\_\_\_ Session 12A:** COMPARISON OF GRANTOR VS NON-GRANTOR TRUSTS: AN ANALYSIS OF THE TECHNIQUES THAT USE

GRANTOR TRUSTS TO THE TECHNIQUES THAT USE NON-GRANTOR TRUSTS - *David Handler*

**\_\_\_ Session 13A:** CYBER SECURITY: BEST PRACTICES IN SAFEGUARDING CLIENT COMMUNICATIONS

AND CLIENT FILES - *Stuart Kohn & Lisa Vandesteeg*

**\_\_\_ Session 14A:** OF SWIFTIES AND SKIPPIES: A MODERN TAKE ON THE GST TAX STRAIGHT FROM THE (NOT SO)

TORTURED PLANNERS DEPARTMENT - *Steven Bonneau*

**\_\_\_ Session 15A:** TYING IT ALL TOGETHER: REVIEW OF CONFERENCE PRESENTATIONS AND KEY TAKEAWAYS

*Turney Berry & Charles “Clary” Redd*

**Track B Sessions**

**\_\_\_ Session 9B:** MOVING TIME: OVERCOMING TOO MUCH VALUE IN GST VULNERABLE TRUSTS - *Chris Siegle*

**\_\_\_ Session 10B:** A VIEW FROM THE TRENCHES: CURRENT ISSUES IN TRANSFER TAX AUDITS AND LITIGATION - *John Porter*

**\_\_\_ Session 11B:** ARTIFICIAL INTELLIGENCE (“AI”) IN THE T&E PRACTICE: DUTY OF COMPETENCE, UNAUTHORIZED PRACTICE AND

OTHER ETHICAL CONSIDERATIONS - *Gerry Beyer*

**\_\_\_ Session 12B:** PROVIDING THE SPOUSE WHO CREATED THE SLAT ACCESS TO SLAT’S ASSETS IF THE BENEFICIARY SPOUSE DIES OR IS

DIVORCED AND OTHER OVERLOOKED CONCERNS TO ADDRESS WITH SLATs - *George Karibjanian*

**\_\_\_ Session 13B:** CORPORATE TRANSPARENCY ACT: AN UPDATE ON HOW CTA INTERSECTS WITH TRUSTS INCLUDING

ETHICAL CONSIDERATIONS - *Jocelyn Borowsky*

**\_\_\_\_ Session 14B:** USING THE GRANTOR TRUST SUBSTITUTION POWER FOR A GRANTOR TRUST’S ENCUMBERED REAL ESTATE:

OBSTACLES, TRAPS TO AVOID AND POTENTIAL SOLUTIONS - *Stephen Breitstone*