



2023 CFSEK ESTATE PLANNING FORUM

The Foundry at Block22 🌻 Pittsburg, Kansas 🌻 June 13 • 9:30 - 5:00



Ethical Considerations for Mutual Clients

10:00 - 10:50 AM // CLE only (Ethics)

Tim will address the ethical considerations when an estate-planning-related discipline requires expertise from other disciplines to serve clients properly.



Pros & Cons of Probate-Avoidance Devices

11:00 - 11:50 AM // CLE, CPE, Insurance CE, PACE

Tim will discuss in detail the pros and cons of using various probate-avoidance devices like revocable trusts, joint tenancies, etc.



Drafting Revocable Trusts to Limit Disharmony

1:00 - 1:50 PM // CLE, CPE, Insurance CE, PACE

Tim will address provisions to consider including in revocable trusts to minimize family disharmony following a parent's death or disability.



Drafting Support and Discretionary Trusts

2:00 - 2:50 PM // CLE, CPE, Insurance CE, PACE

Tim will introduce the basic elements of support and discretionary trusts and their pros and cons.



Current Developments in Estate Planning

3:00 - 4:40 PM // CLE, CPE, Insurance CE, PACE

Corey and Tim will review recent state and federal legislative, judicial, and regulatory developments affecting estate planning.

Our Presenters:



**Tim
O'Sullivan**
Foulston Siefkin LLP



**Corey
Moomaw**
Foulston Siefkin LLP