NOON MEETING
THURSDAY, MARCH 7, 2019
NORTHWOOD CLUB
6524 Alpha Road, Dallas, Texas
(Lunch is served Noon-12:30; Program 12:30-1:30)

RESERVATION DEADLINE: WEDNESDAY, FEBRUARY 28 (5:00 P.M.)
(PAYMENT MUST BE RECEIVED BY FEBRUARY 28 (5:00 P.M.) TO GUARANTEE A MEAL)

CURRENT ESTATE PLANNING DEVELOPMENTS
STEVE AKERS

This presentation will include a summary of estate planning current developments, including a discussion of legislative, regulatory, and case law developments. The focus will be on issues of practical importance in advising clients (including observations from the Heckerling Institute on Estate Planning) about important estate planning trends. Specific topics included are observations from tax litigators of current IRS focus points in transfer tax audits and litigation, recent developments regarding the use of defined value clauses to minimize gift tax exposure from transfers of hard-to-value assets, estate planning for moderately wealthy clients, and evolutionary planning with practice ideas to increase clients' and planners' happiness. Steve R. Akers, JD, is a Managing Director with Bessemer Trust Company, N.A., in Dallas, Texas, where he is Senior Fiduciary Counsel and chairs the Estate Planning Committee. Mr. Akers is a member of the Advisory Committee to the University of Miami Philip E. Heckerling Institute on Estate Planning and is a frequent speaker at that Institute, as well as other estate planning seminars across the country. Mr. Akers has received the Distinguished Accredited Estate Planner Award from the National Association of Estate Planning Councils, the Distinguished Probate Lawyer Lifetime Achievement Award from the State Bar of Texas Real Estate, Probate and Trust Law Section, and the Lifetime Achievement Award from the Dallas Bar Association Probate, Trusts & Estates Section. Mr. Akers received his B.S. degree in Chemical Engineering from Oklahoma State University and his J.D. degree from the University of Texas School of Law.

There is continuing ed credit pending for this presentation. The program handouts are paperless. The handout will be available to download on the website (Document Library) a few days prior to each meeting. YOU may print the handout if you prefer to have a handout at the meeting.

Note: Paid membership dues do not include meals. To register for the meeting, complete the form below, enclose a check (payable to Dallas Estate Planning Council) for the respective amount (indicated below) and mail to: Dallas Estate Planning Council, P.O. Box 38553, Dallas, TX 75238-8553. You may register online with a credit card payment on the website: go to www.dallasepc.org, look for “Upcoming Events” on the left column and click on the date – Event Details, scroll down to the bottom of the page and register. LOG IN IS NOT REQUIRED TO REGISTER. If you need a receipt, print out the confirmation page.
**PREPAID MEALS:** Members who have already paid in advance for all meetings for the year MUST register so we will have a count for the number of meals to prepare. **PREPAID MEMBERS MUST REGISTER ON THE WEBSITE BY THE DEADLINE**, go to www.dallasepc.org, look for “Upcoming Events” on the left column, click on the date for Event Details, scroll down to the bottom of the page and register.

**THERE WILL BE 10 MEALS AVAILABLE FOR WALK-INS ON DAY OF MEETING (FIRST COME, FIRST SERVE). ALL OTHER WALK-INS WILL BE “PROGRAM ONLY”.** CREDIT CARDS ARE NOT ACCEPTED AT THE DOOR, CASH OR CHECK ONLY. Member: $37 (includes meal and program); Guest: $60 (includes meal and program);*Member-Program Only: $25 (*ONLY MEMBERS may choose “program only” for $25; $20 - GUEST - Emerging Professionals – FIRST MEETING (includes meal/program-MUST be 40 years of age or younger or less than 5 years in respective discipline – MUST REGISTER BY THE DEADLINE)

Name: ________________________________________ __$37 ___$60___$25 (Member-Program Only) ___$20 (GUEST EP-First Meeting)
E-mail: ________________________________________ Phone No: ________________________________

WE WOULD LIKE TO THANK OUR MEETING SPONSORS: ARMANINO LLP, BESSEMER TRUST COMPANY, CLIFTON LARSEN ALLEN, COMMUNITIES FOUNDATION OF TEXAS, TEXAS WOMEN’S FOUNDATION, FROST BANK, HIGHGROUND ADVISORS, JACKSON, WALKER, MERRILL LYNCH – MAYNARD GROUP, PARKLAND FOUNDATION, QUEST CAPITAL MANAGEMENT, THE CATHOLIC FOUNDATION AND TOLLESON WEALTH MANAGEMENT. IT IS THE SPONSORS WHO MAKE POSSIBLE THE SOCIAL EVENTS AND PROVIDING EXCELLENT SPEAKERS.

IN ADDITION, WE WOULD LIKE TO RECOGNIZE THE PATRONS: ALTAVIEW ADVISORS, BISIGNANO HARRISON & NEUHOFF, CROCKETT, MCBRIDE & ASSOCIATES, DAVIS STEPHENSON, GLAST, PHILLIPS & MURRAY, GOLDIN PEISER & PEISER, PLAINSCAPITAL BANK, SIGNET ART AND THE CATHOLIC FOUNDATION. THE PATRON PROGRAM PROVIDES ADDITIONAL FUNDS TO SUPPORT THE COUNCIL’S ACTIVITIES.

**REMAINING DEPC SCHEDULE:**

**APRIL 4: BREAKFAST/NORTWOOD CLUB**
SPEAKER: Mary Ann Mancini
TOPIC: Uses for Life Insurance Beyond Taxes

**MAY 2: BREAKFAST/DOUBLETREE HILTON**
SPEAKER: Christine Wakeman
TOPIC: Estate/Asset Protection Planning for Generation 2 in a Family Business

(Breakfast meetings are 7:30 a.m. – 9:00 a.m. and lunch meetings are Noon - 1:30 p.m.)