47^{th} Notre Dame Tax & Estate Planning Institute

A Tasting Menu of Planning Ideas

A KEY ESTATE PLANNING GUIDE

Law Easy

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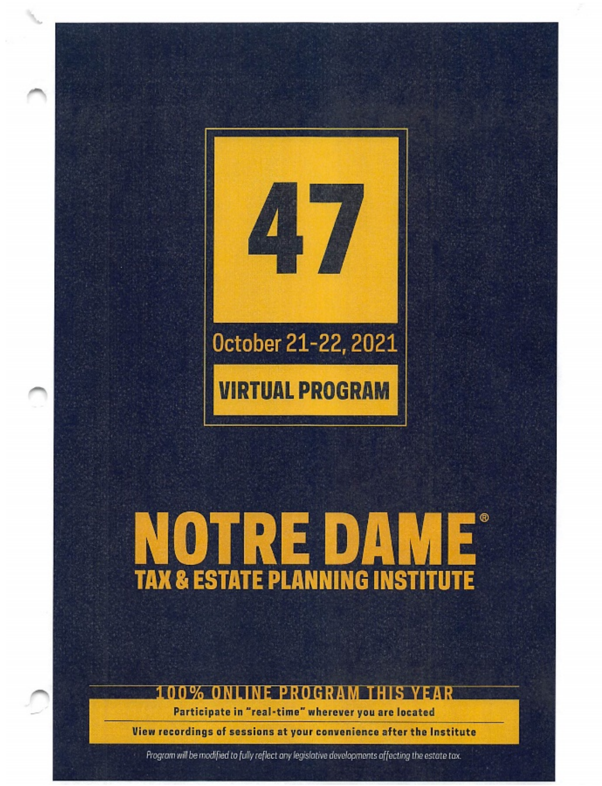
47th Notre Dame Tax & Estate Planning Institute



Tax and Estate Planning Institute

- The 47th Annual Notre Dame Tax & Estate Planning Institute will take place (in virtual form) on October 21 and 22, 2021. We have lined up an impressive panel of speakers who will, as always, address a broad range of topics (including up-to-date discussions of legislative developments) that will be of use to you and your clients.
- As with last year's successful Institute, we plan to deliver the Institute to you in a virtual format with live, online presentations (including our popular dual-track approach) throughout the day on Thursday, October 21, and Friday, October 22. This virtual format will allow you to participate online in real time with the speakers, including opportunities for Q&A, and will be structured to qualify for continuing education credit to the extent allowed by the respective accrediting agencies. Based on the positive feedback we received last year, we again plan to record videos of all the sessions and your registration fee will include online access to these recordings for later viewing at your convenience.

Tax and Estate Planning Institute

- While we will miss seeing you in person again this year and facilitating the camaraderie that is associated with the Institute, we are pleased to be able to provide you with the information and knowledge that so many of you have come to rely on. We also hope that this virtual format will enable many estate planning professionals, who might not otherwise have had the chance to attend the Institute in person, to engage with and benefit from the Institute this year.
- For details regarding the speakers and topics, please download a copy of the Institute's brochure.

Some Webinar Pointers

- The PowerPoint is available for download from the web console during the program.
- A recording of this program and the materials will be posted to www.shenkmanlaw.com/webinars. There is a growing library of 50+ webinar recordings there.
- There is a growing library of 150+ video planning clips on www.laweasy.com.
- There is no CLE or CPE for this program, but you will be sent a certificate of attendance from the webinar system. We cannot control those certificates so if there is an issue we cannot assist.
- If you have questions, please email the panel. All emails are listed on near the end of the slide deck.

General Disclaimer

- The information and/or the materials provided as part of this program are intended and provided solely for informational and educational purposes. None of the information and/or materials provided as part of this power point or ancillary materials are intended to be, nor should they be construed to be the basis of any investment, legal, tax or other professional advice. Under no circumstances should the audio, power point or other materials be considered to be, or used as independent legal, tax, investment or other professional advice. The discussions are general in nature and not person specific. Laws vary by state and are subject to constant change. Economic developments could dramatically alter the illustrations or recommendations offered in the program or materials.

Thank you to our sponsors

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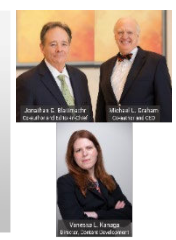

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NATIONAL PROFESSIONAL ADVISOR NETWORK

Introduction

- Jerome Hesch, Esq.

Avoiding Ethical issues

- Alan Gassman, Esq. and Jonathan G. Blattmachr, Esq.

Creative Planning and possible tax changes

- Jonathan G. Blattmachr, Esq. and Martin M. Shenkman, Esq.

Freeze the QTIP and Non-GST trust

- Jerome Hesch, Esq.

Divorce and beneficial interests

- Sandra Glazier, Esq.

Using existing income tax techniques

- Jerome Hesch, Esq.

Diversity

- Martin M. Shenkman, Esq.

Spousal Lifetime Access Trusts (SLATs)

- Christopher Denicolo, Esq.

Using DAPTs for other reasons

- Alan Gassman, Esq.

Preferred partnership freeze

- Todd Angkatavanich, Esq.

Impact of mortality tables on charitable trusts

- Jerome Hesch, Esq.

Conclusion

- A final word from Jerry Hesch, Esq. dean of the Notre Dame Tax & Estate Planning Institute

Additional information

- Notre Dame
- Law.nd.edu/estateplanning