

SC BAR CLE DIVISION PRESENTS A LIVE SEMINAR

2017 Al Todd Estate Planning Workshop



Friday, July 7 & Saturday, July 8

**Kiawah Island Golf Resort
Turtle Point Clubhouse
Kiawah Island, SC**

*Co-sponsored by the SC Bar Probate, Estate Planning
& Trust and Tax Law Sections*



South Carolina Bar

Continuing Legal Education Division



CLICK [HERE](#) TO REGISTER ONLINE.

MCLE/LEPR CREDIT

This program qualifies for 8.75 MCLE credit hours, including up to 1.0 LEPR credit hour and 1.0 SA/MH credit hour, and 7.75 Estate Planning and Taxation Specialty credit hours.

The South Carolina Bar – CLE Division is proud to present the 2017 Al Todd Estate Planning Intensive Workshop. This advanced level program is designed for experienced estate planners and tax attorneys and is named in honor of workshop founder Al Todd. **READ MORE**

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ABOUT THE PROGRAM

This special two-day workshop will open with presentations from Dean Brant Hellwig of Washington and Lee University, followed by Marie Monroe and Billy Newsome. Friday will also include a unique ethics presentation by Michal Burke. You don't want to miss Saturday morning with John Goldsbury from U.S. Trust, as well as Ben Dean and Scott Schmidt's Firearms and Estate Planning presentation followed by Charles Hodges of Jones Day.

You will have some time Friday and Saturday afternoons to network and enjoy Kiawah Island and all it has to offer, such as a relaxing spa treatment, golf, or just lounging by the pool or beach. Friday night will feature a reception for you and your family!

Don't miss this unique opportunity for advanced-level training, active participation and networking with your peers at one of the top five travel destinations in North America!

AGENDA

FRIDAY, JULY 7

- 8:00 a.m. Registration and Continental Breakfast**
Continental Breakfast sponsored by BB&T Wealth
- 8:20 a.m. Welcome and Opening Remarks**
*Professor S. Alan Medlin
William M. "Bill" Reynolds III
Jonathan E. Spitz
Arthur E. "Artie" White III*
- 8:30 a.m. Estate and Gift Tax Landscape Under the Trump Administration**
*Brant J. Hellwig
Dean and Professor of Law, Washington and Lee University
School of Law*
- 9:30 a.m. Income Tax Issues Arising in the Context of a Death of a Partner**
*Brant J. Hellwig
Dean and Professor of Law, Washington and Lee University
School of Law*
- 10:30 a.m. Break**
Sponsored by GreerWalker, CPAs
- 10:45 a.m. Retirement Planning with Employee Benefits**
*E. Marie Monroe
Merline & Meacham, P.A., Greenville*
- 11:45 p.m. Networking Lunch**
Sponsored by South State Bank
- 12:15 p.m. Never Enough: The Relationship Between Substance Abuse and Compulsive Gambling**
Michael J. Burke, Howell, MI
- 1:15 p.m. Planning for a Fight: What Every Estate Planner Needs to Know About Trust & Estate Litigation**
*William G. Newsome III
Nexsen Pruet, LLC, Columbia*
- 2:15 p.m. Adjourn**
- 6 p.m. Reception (for attendees and families; dress is business/resort casual)**
*Osprey Point Clubhouse
Sponsored by Argent Trust Company*

SATURDAY, JULY 8

- 8:00 a.m. Continental Breakfast**
Sponsored by Colonial Trust Company
- 8:30 a.m. Federal Income Taxation of Trusts**
*John Goldsbury
U.S. Trust, Charlotte, NC*
- 9:30 a.m. Firearms and Estate Planning in South Carolina: Don't Let Your Clients Shoot Themselves (or You) in the Foot!**
*Benjamin L. Dean
Scott H. Schmidt
Dean & Schmidt, Columbia*
- 10:30 a.m. Break**
- 10:45 a.m. How to Deal with (or Avoid) the IRS from Audit Through Court**
*Charles E. Hodges II
Jones Day, Atlanta*
- 11:45 a.m. Small Group Breakout Sessions - Discussions of Current Estate Planning Trends and Topics**
- 12:30 p.m. Adjourn**

[CLICK HERE TO REGISTER ONLINE.](#)

Special thanks to the SC Bar's Probate, Estate Planning & Trust and Tax Law Sections for their support of this wonderful program, as well as our other sponsors.

SPONSORS & EXHIBITORS

American Cancer Society
Argent Trust Company (Friday Reception Sponsor)
BB&T Wealth Management (Friday Breakfast Sponsor)
Colonial Trust Company (Saturday Breakfast Sponsor)
GreerWalker, CPAs (Saturday Breakfast Sponsor)
Lawgic, LLC
SC Bar Probate, Estate Planning & Trust Law Section
SC Bar Tax Law Section
Security Federal Trust
South State Bank & Trust (Friday Lunch Sponsor)
U.S. Trust

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HOW TO REGISTER:

E-MAIL—Complete this form, scan and e-mail to registrar@sbar.org.

MAIL—Complete this form and mail to: SC Bar-CLE, P.O. Box 608, Columbia, SC 29202.

ONLINE—www.sbar.org/cle, select this seminar under "Live Courses."

For assistance or to register by phone, call (803) 771-0333 or (800) 768-7787.

CLICK [HERE](#) TO REGISTER ONLINE.

REGISTRATION FORM, #17-25

Name: _____ Bar#: _____

Firm/Court: _____

Address: _____

City, State, Zip: _____

Phone: _____

E-mail: _____

RESERVATION INFORMATION:

A block of villas has been reserved at Kiawah Island Resort's East and West Beaches. The program will be held at Turtle Point Clubhouse at East Beach. East Beach one-bedroom scenic villas are \$304 per night plus resort fee & taxes and West Beach one-bedroom scenic villas are \$270 per night plus resort fee & taxes (the rates include on island transportation). For reservations, call 800-654-2924 and ask for Villa Reservations and, mention the SC Bar – Estate Planning Workshop, booking code 9702. [Click here](#) to download the reservation form. Deadline for making reservations is June 6. Reservations received after this date will only be filled on a space-and-rate available basis.

Registration Fee:

Probate/Estate Planning Section Members: \$385 (\$435 after 6/23)

Tax Law Sections Members: \$385 (\$435 after 6/23)

All others: \$435 (\$485 after 6/23)

Unfortunately, we cannot accept SC Bar complimentary or discount coupons for this program.

Enclosed is my check in the amount of \$ _____

Please charge my: AmEx Discover MasterCard Visa

Billing Address: _____

Card #: _____ Exp. Date: _____

Signature: _____

All registrations must be pre-paid. All fax and internet registrations must include a credit card number.

Cancellation & Refund Policy: Refunds, less \$50 administrative fee, will be made for cancellations received in writing to the CLE Registrar at registrar@sbar.org by 5 p.m., one week prior to the seminar. Cancellations will not be accepted within one week of seminar date. Designated substitutes may take the place of registrants unable to attend.

If you have a disability, please call ahead to let us know how we may accommodate your needs.