2007 Estate Planning
November 9, 2007 • InterContinental Stephen F. Austin Hotel • Austin, TX

Friday Morning, Nov. 9, 2007

Presiding Officer:
Stanley M. Johanson, The University of Texas School of Law - Austin, TX

	Please select on registration form The Taxation Conference requires separate registration. The Wednesday-Thursday Taxation Conference requires separate registration. Please select on the order form to register for the Full Three-Day Conference.
7:30 am	**Registration Opens** Includes continental breakfast.
8:30 am 1.25 hrs	**Recent Developments Affecting Estate Planning** Developments relating to status of "repeal" of estate tax; review of recent cases and rulings relating to gift and estate taxation of life insurance, family limited partnerships, valuation issues, IRA's, marital deduction planning, disclaimers, and other estate planning topics. Stanley M. Johanson, The University of Texas School of Law - Austin, TX
10:00 am 1.00 hr	**What Really Happens After I Mail the Form 706 of Form 709 to Cincinnati?** Current "insider IRS" topics of interest to the private practitioner, including the effect of "downsizing" Estate & Gift examiners, how the Service's FLP task force functions, and other interesting issues. James Larry Gulley, Katy, TX
11:00 am 1.00 hr	**Pre-Mortem and Post-Mortem Income Tax Issues** Income tax issues arising from lifetime gifts, related party transactions, the Final 1040, basis adjustments at death, post-mortem planning options and elections. Mickey R. Davis, Bracewell & Giuliani LLP - Houston, TX

Friday Afternoon, Nov. 9, 2007

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12:00 pm	**Pick up Box Lunch** Included in conference registration fee.

12:15 pm 1.00 hr 0.50 hr ethics	**Luncheon Presentation-Problems Posed by Tax Strategy Patents** The policy and practice issues raised by the phenomenon of tax strategy patents. Ellen P. Aprill, Loyola Law School - Los Angeles, CA
1:30 pm 1.00 hr	**Recent Developments in Federal Tax Valuation** This talk will focus on recent developments relating to the determinatrion of the fair market value of property for purposes of federal taxes, particularly wealth transer taxes. Among the topics to be covered will be the latest developments concerning family limited partnerships and the discount for lack of marketability; and the new regulatory regime imposed on appraisers by the Pension Protection Act of 2006. John A. (Jack) Bogdanski, Lewis & Clark Law School - Portland, OR
2:45 pm 1.75 hrs	**Estate Planning Workshop** This workshop will cover practical issues relating to (i) ethical issues commonly faced by practitioners in the estate planning area, (ii) hot-button issues stemming from recent cases and regulations (final and proposed), and (iii) the panelists' views on current "hot" estate planning techniques, including variable annuities. John A. (Jack) Bogdanski, Lewis & Clark Law School - Portland, OR Carol A. Cantrell, Briggs & Veselka Co. - Bellaire, TX Mickey R. Davis, Bracewell & Giuliani LLP - Houston, TX James Larry Gulley, Katy, TX Stanley M. Johanson, The University of Texas School of Law - Austin, TX