FOULSTON
ATTORNEYS AT LAW

SEMINARS

2020 ESTATE PLANNING FORUM

January 31, 2020

NEW FOR 2020

This coming year marks a significant restructuring of our popular estate planning seminars. We're excited to launch our first annual 2020 Estate Planning Forum. Instead of two half-day forums, we're offering one full-day forum in January. This allows us to offer at one time all federal and state estate planning developments deemed significant during the prior year and address federal and state legislative changes appearing to be on the horizon; double attendance credits for time efficiency (especially for those who travel to attend); permit additional opportunities for attendees to meet one another at breaks and lunch; and perhaps most importantly, have the freedom to provide expanded discussions with examples on topics, which as much as possible will be chosen on their ability to be integrated with each other. We look forward to seeing you there!

Friday, January 31, 2020
8:30 AM - 3:45 PM (Registration begins at 8:00; lunch provided)
Wichita Marriott (Get directions)
9100 E. Corporate Hills Drive, Wichita, KS 67207

Download agenda
View brochure

REGISTRATION

This forum is for CPAs, trust officers, financial planners, CLUs, and general insurance agents whose professional practice encompasses estate planning matters. It is also geared for administrative personnel and development officers with charitable organizations, as well as social workers and other individuals facing estate planning issues involving elder care.

Register online (credit card required)
Download registration form to mail or fax

Seating is limited and space will be available on a first-come, first-served basis. Registration fee is $160 and includes breakfast, lunch, parking, and downloadable digital materials for all sessions; printed materials will not be provided at the seminar.

TOPICS

Recent Developments in Estate Planning
This session will discuss what Foulston estate planning attorneys consider the most significant developments since the previous forum. Such developments will include federal and state legislative developments, judicial decisions, and IRS regulations and rulings that have the greatest impact on estate planning professionals.

Comprehensive Medicaid Planning Rules and Strategies
This session will thoroughly discuss the three elements of Medicaid planning and the methods and strategies which achieve them: Medicaid eligibility planning for married and single persons, essential and desirable provisions in related estate planning documents, and minimizing estate recovery of Medicaid benefits by the State of Kansas. Additionally discussed will be the utilization of “d4a trusts” to protect assets of disabled individuals under 65 from having to be “spent down” prior to qualifying for Medicaid benefits.

Medicaid Planning for Farmers and Ranchers
The pre-lunch session will continue the foregoing discussion and extend it to farmers and ranchers and how their assets are normally well-situated for Medicaid eligibility, yet for the most part, their estates are poorly planned for long-term care and Medicaid eligibility. It will also include how such strategies comport with traditional estate and tax planning for agricultural assets.

Making Sense of Trust Distribution Provisions
This session will address trust distribution provisions and their great impact in the three basic types of trusts in which they are found: support, discretionary, and hybrid trusts. The failure of attorneys and their clients to understand such provisions in these types of trusts, as well as their import on carrying out the intent of the grantor, minimizing taxes, maximizing governmental resource eligibility, affording creditor protection, and maintaining family harmony is extremely common and is at the root cause of a high percentage of trusts failing to properly address such goals and concerns.

FORUM PRESENTERS

Matthew W. Bish
Matt Bish practices in the areas of estate planning, probate, and elder law at Foulston Siefkin. Matt represents clients in connection with estate and tax planning and the administration of trusts and estates. He has experience developing wills, revocable living trusts, irrevocable trusts, generation-skipping trusts, powers of attorney, premarital agreements, advance directives, and limited liability companies. He also represents clients in the administration of estates before the probate court. Matt has been selected by his peers for inclusion in *The Best Lawyers in America*© in the areas of Elder Law and Trust and Estates. Matt received his J.D. from Washburn University School of Law.

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Timothy P. O'Sullivan
Tim O'Sullivan practices in the areas of estate planning, probate, trust law, and elder law at Foulston Siefkin. He was selected by his peers for inclusion in the Missouri & Kansas Super Lawyers® list and *The Best Lawyers in America*© in the areas of Elder Law and Trusts and Estates. In 2011 and 2016, he was named by *Best Lawyers*® the Wichita Elder Law "Lawyer of the Year;" and in 2010, the Wichita Trusts and Estates "Lawyer of the Year." Tim is a Fellow of the American College of Trust and Estate Counsel. His peer memberships include the National Academy of Elder Law Attorneys (NAELA) and the Wichita Estate Planning Council. Tim received a J.D. from Washburn University School of Law and an LL.M. in Taxation from the University of Missouri-Kansas City School of Law.

Stewart T. Weaver
Stewart Weaver practices in the areas of estate planning, probate, and elder law at Foulston Siefkin. He has a broad range of experience in developing and implementing both simple and complex estate planning techniques. Stewart is a Fellow of the American College of Trust and Estate Counsel (ACTEC). He was selected by his peers for inclusion in the Missouri & Kansas Super Lawyers® list and *The Best Lawyers in America*© in the areas of Elder Law and Trusts and Estates. In 2019, he was named by *Best Lawyers*® the Wichita Elder Law "Lawyer of the Year;" and in 2017, the Wichita Trusts and Estates "Lawyer of the Year." He is also a member of the Wichita Estate Planning Council. Stewart received his J.D. from Washburn University School of Law.

Corey L. Moomaw
Corey Moomaw is a member of Foulston's transactional team. He is a member of the Kansas Bar Association and Wichita Bar Association. Corey received his J.D. from Washburn University School of Law and an LL.M. in Taxation from Georgetown University Law Center.

CERTIFICATION

The 2020 Estate Planning Forum is designed to qualify for CPE, CE, CLU, ChFC, CFP, and CLE continuing education (CE) credits. This program has been preapproved for 7 CE credit hours by the Certified Financial Planner Board of Standards, 7 CE credit hours by the Kansas Insurance Department, and 7 CLE hours by the Kansas Continuing Legal Education Commission. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit.

FOR MORE INFORMATION

Call 316.291.9723 or 800.267.6371 or email Liz Golay at lgolay@foulston.com.

PRACTICE AREAS

- Estate Planning & Probate
- Trust & Estate Litigation