FOULSTON
ATTORNEYS AT LAW

1551 N. Waterfront Parkway, Suite 100
Wichita, Kansas 67206-4466

Introducing a comprehensive, full-day program for 2020.
See details inside.

Introducing a comprehensive, full-day program for 2020:

ESTATE PLANNING FORUM

Friday, January 31, 2020, at Wichita Marriott
www.foulston.com/estateplanning

FOULSTON
ATTORNEYS AT LAW

ESTATE PLANNING FORUM

Friday, January 31, 2020 | Wichita Marriott

8:30 AM - 3:45 PM

Wichita Marriott, 9100 E. Corporate Hills Drive, Wichita, KS 67207

3 Easy Ways to Register:

1. Online
Credit Card Required
www.foulston.com/estateplanning

2. Fax Form
Credit Card Required
Email to lgolay@foulston.com
866.346.2027

3. Mail Form
Foulston Siefkin LLP
Estate Planning Forum
1551 N. Waterfront Parkway, Suite 100
Wichita, KS 67206-4466

Please Print: *(one registration form per attendee)*

Name: ______________________

Title: ______________________

Company: ______________________

Address: ______________________

City/State/Zip: ______________________

Phone: ______________________

E-mail:* ______________________

**Required for confirmation and notification of seminar changes*

Payment Options:

☐ Check enclosed payable to Foulston Siefkin LLP for $160

☐ Charge my: ☐ Visa ☐ Mastercard ☐ American Express ☐ Discover

Card Number ______________________ Exp. Date ____________

Name on Card ______________________ CSV ____________

Please return this completed form to the address, email, or fax number shown above. For more information, please call **316.291.9723** or email Liz Golay: **lgolay@foulston.com.** If outside Wichita, call 800.267.6371.

Registration fee includes breakfast, lunch, parking, and digital materials for all sessions. A link to download the materials will be emailed to paid registrants prior to the seminar; printed materials will not be provided. Enrollment is not available for attorneys in private practice without prior approval. This program was designed to qualify for CPE, CE, CLU, ChFC, CFP, and CLE continuing education credits. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit.

Cancellations/refunds: A full refund, minus a $25 administrative fee, will be issued for cancellations up to five business days before the event. No-shows and cancellations received fewer than five business days prior to the seminar are not eligible for a refund. Substitutions may be made at any time, including the day of the seminar.

Please note: Registration and attendance at Foulston events serves as consent for Foulston to capture and use your photo, image, and/or voice on our website, publications, social media channels, and any other media.

www.foulston.com/estateplanning

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!

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. The 2020 Estate Planning Forum is designed for CPE, CE, CLU, ChFC, CFP, and CLE continuing education credits. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit.

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. He can be reached at 316.291.9729 or mbish@foulston.com.

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. He can be reached at 316.291.9564 or at tosullivan@foulston.com.

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. He can be reached at 316.291.9736 or sweaver@foulston.com.

Corey L. Moomaw

Corey Moomaw is a member of Foulston Siefkin'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. He can be reached at 316.291.9726 or cmoomaw@foulston.com.

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 & 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 & 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.

AGENDA

Friday, January 31, 2020 | Wichita Marriott

8:00 - 8:30	Registration and Breakfast
8:30 - 10:00	Recent Developments in Estate Planning
10:00 - 10:15	Break
10:15 - 11:45	Comprehensive Medicaid Planning Rules & Strategies
11:45 - 12:30	Lunch (Provided)
12:30 - 2:00	Medicaid Planning for Farmers & Ranchers
2:00 - 2:15	Break
2:15 - 3:45	Making Sense of Trust Distribution Provisions

FOULSTON
ATTORNEYS AT LAW

Estate Planning Practice Group

AREAS OF REPRESENTATION:

Wills
Testamentary Trusts
Revocable Trusts
Powers of Attorney
Living Wills
Family Harmony Preservation
Buy/Sell Agreements
Gifting Programs
Transfer of Control & Wealth
Tax Audit Representation
Business Succession
Charitable Giving
IRS Filings
Elder Care
Family Limited Partnerships
Limited Liability Companies
Irrevocable Trusts
Insurance Planning
Premarital Agreements
Guardians & Conservators
Generation Skipping
Creditor Protection
Fiduciaries: Trustees, Executors, Personal Representatives, Administrators
Probate
Medicaid & Other Government Resources
Special Needs

Kansas Estate Planning Guide

Tim O'Sullivan is the author of the Kansas Estate Planning Guide. This 240-page book is designed to be an objective discussion of most factors involved in the estate planning process. Unlike most estate planning books designed for the general public, it specifically addresses the impact of Kansas laws on estate planning issues and techniques. The author believes this book is one of the most comprehensive and informative overviews available to assist Kansas residents in either implementing an estate plan or reviewing an existing estate plan. Order your copy now and learn more at: **foulston.com/EstatePlanningGuide**.