TURNEY P. BERRY

WYATT, TARRANT & COMBS, LLP
[redacted]

Areas of Primary Work

Estate and Business Planning
Estate and Trust Administration
Charitable Giving and Tax-Exempt Organizations

Education

Vanderbilt University, J.D., 1986
University of Memphis, B.A., History (with honors), 1983
University of Memphis, Bachelor of Liberal Studies, Classics (with honors), 1983

Admitted to Practice

Supreme Court of Kentucky, 1986
United States Court of Appeals, Sixth Circuit, 1993
Supreme Court of the United States, 1993

Current Activities in Areas of Concentration

American College of Trust and Estate Counsel

- Vice Chair of State Laws Committee
- Member and Past Chair of Estate and Gift Committee
- Member and Past Chair of Charitable Planning and Exempt Organizations Committee
- Member, Long-Range Planning Committee
- Member, Amicus Review Committee
- ACTEC Liaison to the Uniform Law Commission
- Past State Chair for Kentucky
- Past Regent
- Past President, ACTEC Foundation

Uniform Law Commission

- Co-Chair, Drafting Committee on Economic Rights of Unmarried Cohabitants Act
- Member, Drafting Committee on Revised Disposition of Community Property Rights at Death Act
- Vice-Chair, Drafting Committee on Conflicts of Laws in Trusts and Estates

- Vice-Chair, Drafting Committee on Electronic Wills Act (2019)
- Chair, Uniform Fiduciary Income and Principal Act (UFIPA) (2018)
- Vice-Chair, Directed Trust Act (2017)
- Member, Revised Uniform Fiduciary Access to Digital Assets Act (2015)
- Chair, Power of Appointment Act (2013)
- Member, Trust Decanting Act (2013)
- Member, Premarital and Marital Agreements Act (2012)
- Member, Insurable Interests Amendment to the Uniform Trust Code (2010)
- Member, Real Property Transfer on Death Act (2009)
- Member, Probate Code Revisions (2008)

Fellow, American College of Tax Counsel
Member, American Law Institute
Member, Joint Editorial Board for Uniform Trust and Estate Acts
Member, Bloomberg BNA Tax Advisory Board (Estates, Gifts, and Trusts)
Member, Advisory Council of the Heckerling Institute on Estate Planning
Member, Advisory Board of Trusts and Estates Monthly
Member, The International Academy of Estate and Trust Law
Legal Advisory Subcommittee, Council on Foundations
Co-Chair, Midwest/Midsouth Estate Planning Seminar (University of Kentucky)
National Committee on Planned Giving (Kentucky Chapter)
Louisville Estate Planning Council
Associate Member, American Association of Life Underwriters
Louisville Bar Association (Sections of Estate Planning and Probate and Taxation)
Kentucky Bar Association (Probate Section)
American Bar Association (Taxation; and Real Property, Trust and Estate Law Sections)
Vice-Chair, Charitable Planning
Real Property, Probate, Trust & Estate Section Conservation Easement Task Force

Teaching Experience:

Heckerling Graduate Program in Estate Planning
University of Miami School of Law
Planning for the Family Business

Vanderbilt University School of Law
Estate Planning and Drafting Seminar
Representing the Family Business, Tax and Non-Tax Aspects
Estate, Gift and Generation-Skipping Transfer Tax

University of Louisville Brandeis School of Law
Estate Planning and Drafting (Non-Tax)
Non-Profit and Charitable Law

University of Missouri School of Law
Representing the Family Business

Duke University School of Law
Donor Advised Funds (Lecturer)

Previous Activities in Areas of Concentration

Trustee, Southern Federal Tax Institute
Member of the Trusts & Estates Mini-Board on the Economics of the Practice and Risk Management (1996-1998)
Former Articles Editor, The Tax Lawyer (1990-1993)
Co-Chair, Louisville Bar Association, Estate Planning and Probate Section (Section of the Year, 1989)
Revenue Cabinet's Practitioner's Liaison Committee (1993 - 1997)
Legal Advisory Subcommittee, Council on Foundations

Achievements

Recipient of the National Philanthropy Day Baylor Landrum Award (2016)
Texas Bar Foundation Outstanding Law Review Article award for article co-authored with Paul Lee titled "Retaining, Sustaining and Obtaining Basis" published by the Texas Tech Estate Planning and Community Property Law Journal in January 2015
NAEPC Estate Planning Hall of Fame® as an Accredited Estate Planner® (Distinguished) Nominee by the National Association of Estate Planners & Councils
Willamette Management Associates 2010 Standard of Excellence award for article titled "Doing Good While Doing Well: Charitable Planning With the Closely-Held Business", appeared in the 2010 Autumn Issue of Insights
The Best Lawyers in America (Woodward/White Publisher)
Kentucky Super-Lawyer, Trusts and Estates
Forty Under Forty: Metro Louisville's Foremost Young Business Leaders (Inaugural class Business First 1996)
American Jurisprudence Award (Wills and Trusts, 1985)
Who's Who in American Law
Omicron Delta Kappa
Phi Kappa Phi
Who's Who Among Students in American Colleges and Universities
Outstanding Young Men in America
Distinguished Citizen of Louisville
Kentucky Colonel

Current Community Involvement

Center for Interfaith Relations (Chairman)
Earth School/Carbon Nation (Board Member)
Honorable Order of Kentucky Colonels (Member)

Rotary Club of Louisville (Member)
Christ Church United Methodist (Daily Walk Sunday School Class)

Previous Community Involvement

Actors Theatre of Louisville (Board Member)
American Lung Association of Kentucky (Secretary/Treasurer and Director)
Arthritis Foundation, Development Committee and Director
Attorney General's Task Force on Election Fraud (Legal Counsel, 1989)
Bellarmine College Board of Overseers
Children's Hospital Foundation Board of Trustees (Vice-Chair)
Combined Health Appeal of Kentucky
Filson Historical Society (Director, 1999-2003)
Focus Louisville Alumni Group (President, 1992-1993)
Fund for the Arts (Board Member)
James Graham Brown Cancer Center Board of Directors
Junior Achievement (Consultant)
Kentucky Academic Association (Chief Official, Governor's Cup -- state and region)
Kentucky Derby Festival Spelling Bee (Official, 1994; Pronouncer, 1997)
Kentucky Derby Festival Foundation
Kentucky Opera (Board Member)
Leadership Louisville Foundation
Law School for Non-Lawyers, Instructor (Louisville Bar Association)
Louisville Bar Foundation, Inc. (Treasurer)
Louisville Free Public Library (Citizens' Advisory Panel, 1991-1992)
Louisville Jaycees (Legal Counsel, 1987-1991)
Louisville Science Center (Director)
Louisville Third Century (Director)
Methodist Evangelical Hospital Foundation (Director)
Muhammad Ali Center (Board Member)
Strassenfest (Co-Chair, 1987; Treasurer 1988, 1989)
St. Xavier High School (Development Committee)

Other Memberships

Lakeside Swim Club
Federalist Society (Founding Member)
Classical Association of the Middle West and South
American Classical League

Professional Publications and Presentations

Books and Chapters

Co-Author, Trust Law in the Commonwealth of the Kentucky (forthcoming)

Quoted in Vegas Voice Special Report, "What happens here only happens here...But should it?"(September 2020)

Co-Author, §§ 2053, 2054 and 2058 Tax Management Portfolio, Estate Tax Deductions

Author, § 4945 Tax Management Portfolio, Private Foundations -- Taxable Expenditures

Author, § 4941 Tax Management Portfolio, Private Foundations -- Self-Dealing

Co-Author, Sections 2053 and 2054 Tax Management Portfolio, Administration Expenses and Debts

Co-Author, Estate Planning Issues for S Corporations, Kentucky Estate Planning, 3rd ed. (University of Kentucky 2009)

"Drafting Wills & Trusts With Closely-Held Business Interests In Mind", Kentucky Estate Planning, 3rd ed. (University of Kentucky 2009)

"Generation Skipping Transfers" and "Drafting for Closely-Held Business Interests", Kentucky Estate Planning Guidebook, (University of Kentucky 1996)

Articles

"A Case For and Against an Estate Tax, Trusts and Estates (December 2020) (Co-Author)

"Review of Reviews: Testamentary Transfers and the Intent versus Formalities Debate: The Case for a Charitable Middle Ground," [Professor Peter T. Wendel, Caruso School of Law], Trusts and Estates (December 2020) (Author)

"More Taxes for the Rich," WealthManagement.com (July 2020) (Commentator)

"Review of Reviews: The Stranger-to-the-Marriage Doctrine: Judicial-Construction Issues Post-*Obergefell*," [Professor Lee-Ford Tritt, University of Florida], Trusts and Estates (May 2020) (Author)

"Review of Reviews: Blockchain Wills," [Professor Bridget J. Crawford, Indiana Law Journal], Trusts and Estates (November 2019) (Author)

"Uniform E-Wills Act Approved," WealthManagement.com, October 2019 (co-Author)

"Ready or Not, Here they Come: Electronic Wills Are Coming to a Probate Court Near You," Probate and Property Magazine (ABA Section of Real Property, Trust and Estate Law) September/October 2019 Vol. 33 No. 5 (Co-Author)

"U.S. Supreme Court: State Violated Due Process by Taxing Trust," WealthManagement.com, June 2019 (Author)

"U.S. Supreme Court Hears Case on State's Ability to Tax Trust Income," The Estate Planner, Wealth Management, April 2019 (Author)

"The "Hook" of Increased Income Tax Basis", Trusts and Estates, April 2018 (Author)

"Update on ULC Activity in Estate Planning", Trusts and Estates, February 2018 (Author)

"Review of Reviews: Defending Place-Based Philanthropy by Defining the Community Foundation," [Professor Roger Colinvaux, Brigham Young University Law Review], Trusts and Estates (November 2017) (Author)

Article contribution to "The Busy Practitioner's Guide to Student-edited Law Journals," Review of Mark Glover's "Freedom of Inheritance," Trusts & Estates, May 2017

"You are under attack!", Louisville Business First, August 2016

Point-Counterpoint (with Jonathan Blattmachr), "Should it Stay or Should it Go? Two industry experts share their thoughts about the advantages and disadvantages of the estate tax," Trusts & Estates, August 2016

"Exit Strategies: If You Can't Get Out, Should You Get In", CharitablePlanning.com, May 2016

"How To Lower the High Cost of Dying - Business Succession 101," Louisville Business First, April 2016 (Co-author)

Article contribution to "The Busy Practitioner's Guide to Student-edited Law Journals," Review of John A. Miller's "Medicaid Spend Down, Estate Recovery and Divorce: Doctrine, Planning and Policy," Trusts & Estates, February 2016

"You Can't Always Get What You Want: The Revised Uniform Fiduciary Access To Digital Assets Act," Trusts and Estates, November 2015 (Co-author)

Article contribution to "The Busy Practitioner's Guide to Student-edited Law Journals," Review of Deborah S. Gordon's "Forfeiting Trust," Trusts & Estates, July 2015

Article contribution to "Special Report: Review of Reviews," Review of Professor Robert H. Sitkoff and Steven J. Horowitz's "Unconstitutional Perpetual Trusts," Trusts & Estates, February 2015

Article contribution to "The Busy Practitioner's Guide to Student-edited Law Journals," Review of Jonathan J. Ossip's "Diversity Jurisdiction and Trusts," Trusts & Estates (December 2014)

"Retaining, Obtaining, and Sustaining Basis," Estate Planning & Community Property Law Journal (Fall 2014) (Co-Author)

"Review of Reviews: Diversity Jurisdiction and Trusts," N.Y.U. L. Rev. (2014 forthcoming)[Jonathan J. Ossip, law student at New York University School of Law in New York City] , Trusts and Estates (December 2014) (Author)

Article contribution to "The Busy Practitioner's Guide to Student-edited Law Journals," Review of Professor Robert H. Sitkoff's "Trusts and Estates: Implementing Freedom of Disposition," Trusts & Estates (March 2014)

"Review of Reviews: Trusts and Estates: Implementing Freedom of Disposition," 58 St. Louis U. L. J. 3 (2014 forthcoming)[Robert H. Sitkoff, John L. Gray Professor of Law, Harvard University, Cambridge, Mass.] , Trusts and Estates (March 2014) (Author)

"Implementing Early Inheritances", Trusts and Estates, December 2013 (Co-author)

"Fiduciary Law Update", Trusts and Estates (September 2013) (Co-Author)

Article contribution to "The Busy Practitioner's Guide to Student-edited Law Journals," Review of Professor Philip J. Ruce's "The Trustee and the Spendthrift: The Argument Against Small Trust Termination," Trusts & Estates (July 2013)

"Review of Reviews: The Trustee and the Spendthrift: The Argument Against Small Trust Termination" [Philip J. Ruce, "The Trustee and the Spendthrift: The Argument Against Small Trust Termination," 48 Gonz. L. Rev. 163 (2012)], Trusts and Estates (July 2013) (Author)

"Fiduciary Law Update", Trusts and Estates (May 2013) (Co-Author)

"Review of Reviews: Fiduciary Duties and Exculpatory Clauses: Clash of the Titans or Cozy Bedfellows?" [Professor Louise Lark Hill, 45 U. Mich. J. L. Reform, No. 4 (2012)], Trusts and Estates (March 2013) (Author)

"Fiduciary Law Update", Trusts and Estates (February 2013) (Co-Author)

"Summary on Exculpatory Clauses," Trusts & Estates (January 2013)

"The Uniform Premarital and Marital Agreements Act", Trusts and Estates (August 2012) (Co-Author)

"Uniform Law Update: Issues Under Consideration By the ULC", Trusts and Estates (March 2012) (Author)

Article contribution to "Special Report: Review of Reviews," Review of Christopher M. Reimer's "The Undiscovered Country: Wyoming's Emergence as a Leading Trust Situs Jurisdiction," Trusts & Estates (February 2012)

"Innovative CLAT Structures: Providing Economic Efficiencies to a Wealth Transfer Workhorse", 31 ACTEC Law Journal (Summer 2011) (co-author)

“When There’s A QPRT and GRAT”, Trusts and Estates (June 2011) (Author)

Article contribution to "Special Report: Review of Reviews," Review of Carter G. Bishop’s "Forgotten Trust: A Check-the-Box Achilles Heel," Trusts & Estates (May 2011)

“News From Heckerling”, Trusts and Estates (January 2011) (Co-Author)

“Reeling, Rolling and Reining In "Shark-Fin" CLATs”, Tax Management Memorandum, Volume 51, Number 25, December 6, 2010, 435 (co-author)

“Doing Good While Doing Well: Charitable Planning with the Closely Held Business,” Williamette Management Associates’ Insights (co-author) (Fall 2010)

“Disclose. Disclose! Disclose? Longmeyer Distorts the Trustee’s Duty to Inform Trust Beneficiaries”, Probate and Property Magazine (ABA Section of Real Property, Trust and Estate Law) July/August 2010 Vol. 24 no 4 (co-author)

“Longmeyer Exposes (or Creates) Uncertainty About the Duty to Inform Remainder Beneficiaries of a Revocable Trust”, 35 ACTEC Journal 179 (2009)(co-author)

“What the Hackl?: Tax Court Expands Gifts of Future Interests to Encompass Nearly All Gifts of Closely Held Business Interests”, Limited Liability Company Guide LLC Advisor (May 23 2002) (co-author)

“Estate Tax Repeal: Should Congress Eliminate the Federal Tax on Inheritance?” The Courier-Journal (July 2000)

“Will We Need More Judges? The Effect of Wiggins on Trustees, Beneficiaries, and Courts”, Louisville Bar Association Bar Briefs (September 1999)

“Charity From Nothing: Protection from Environmental and Premises Liability Under Check-The-Box”, The Exempt Organization Tax Review (June 1999) (co-author)

“A Warning Shot, Yes: But From a Cannon or a Pea-Shooter?”, Tax and Business Planning for Limited Liability Companies (1998) (co-author)

“Charitable Gift Annuities Face Varied State Insurance Regulations”, Trusts and Estates (August 1995)

"Charitable Giving: One of Few Remaining Tax Shelters”, Business First (September, 1993) (Co-Author)

"Use Declining Interest Rates to Cut Your Estate Taxes”, Business First (August, 1992) (Co-Author)

"Charitable Gift Annuities: Federal Taxation and State Regulation”, Journal of Tax-Exempt Organizations (Summer, 1991)

"Planning for the Client Who Owns Underproductive Property", Journal of Taxation (August, 1990)

"IRS' Estate Freeze Guidance Leaves Limited Areas for Planning", Journal of Taxation (December, 1989) (Co-Author)

"IRS Notice Adopts Broad Scope for Section 2036(c)", Journal of Taxation (November, 1989) (Co-Author)

"Using The Services' New Handbook for Estate Tax Examiners", Journal of Taxation (May, 1988) (Co-Author)

Professional Speeches and Presentations

"Recent Legal Developments & Charitable Planning Strategies," The Community Foundation of Louisville Advisor Webinar (November 2020)

"Recent Developments in Estate Planning," Tennessee Federal Tax Conference (November 2020)

"Essential Asset Protection Planning," Canon Financial Teleconference Series (November 2020)

"Hot Topics and New Developments in the Estate Planning Field," Connecticut Bar Association 2020 Federal Tax Institute of New England (November 2020)

"Contemporary Challenges in Trust Administration," Canon Financial Teleconference Series (October 2020)

"Things to Remember As You Come to the Starting Gate and Head Off Down the Track: A Survey of the Charitable Giving Track(s) and On Which Horse Should You Bet?," Florida Bar RPPTL Inaugural Charitable Planning Symposium (October 2020)

"Case Studies and Examples of Charitable Giving and Discouraging the Sale of the Farm?," Florida Bar RPPTL Inaugural Charitable Planning Symposium (October 2020)

"Ethical Issues in Charitable and Related Planning," Florida Bar RPPTL Inaugural Charitable Planning Symposium (October 2020)

"Notable Developments of Interest to Estate Planners," Duke Estate Planning Conference (October 2020)

"Picking Up the Pieces: Post-Divorce Planning," Cannon Financial Teleconference Series (August 2020)

"Things About Which We Should Be Fired Up, Worried, Surprised, or Shocked," 47th Annual Midwest/Midsouth Estate Planning Institute (July 2020)

"Maximizing Flexibility With Powers of Appointment," Cannon Financial Teleconference Series (July 2020)

“Ethics-Based Obligations in Specific Client Engagements,” Cannon Financial Teleconference Series (June 2020)

“Case Law Update,” Louisville Bar Association/KY CPA – 2nd Annual Estate Planning Conference Live Webcast (June 2020)

“Charitable Planning in a Low Interest Rate Environment,” ACTEC 2020 Summer Meeting Virtual Presentation to the Charitable Committee (June 2020)

“Recent Developments of Interest to Estate Planners,” Indiana Continuing Legal Education Forum (ICLEF) 47th Annual Midwest Estate Tax & Business Planning Institute (Live Webcast) (June 2020)

“Modernizing Kentucky T & E Law: 2020 Brings A Great Leap Forward!,” Wyatt Tarrant & Combs, LLP Live Webinar (Spring 2020)

“Developing and Keeping Business for Estate Planning and Trust Professionals,” Cannon Financial Teleconference Series (April 2020)

“Powers of Attorney: Not a Walk in the Park,” Cannon Financial Teleconference Series (March 2020)

“Uniform Electronic Wills Act,” Alaska Bar Association Webinar (March 2020)

“Recent Developments in Charitable Planning,” Texas Tech 12th Annual Estate Planning and Community Property Law Journal CLE and Expo (February, 2020)

“Mathematics and Economics of Estate Planning,” Cannon Financial Teleconference Series (February 2020)

“Upstream Planning and New Basis: The Hottest Game in Town,” Rady’s Children’s Hospital Professional Advisors Symposium (January 2020)

"Client or Non Client?" Cannon Financial Teleconference Series (December 2019)

"Charitable Planning: From the Simple to the Sophisticated," Baltimore Estate Planning Council (December 2019)

"Current Estate and Charitable Planning Issues and Strategies, Including Upstream Planning and Planning to Maximize Income Tax Basis," Allied Professionals Planning Conference (December 2019)

"Notable Developments of Interest for Estate Planners," Blue Grass Estate Planning Council (December 2019)

"Electronic Wills in The Digital Age," AmericanBar.org Webinar (November 2019)

"Recent Developments in Estate Planning," Tennessee Federal Tax Conference (November 2019)

"Bright and Shiny New Ideas, Charitable and Otherwise," Cincinnati Children's Hospital Medical Center (November 2019)

"Current Estate Planning Trends and Tax-Favorable Techniques for Charitable Giving," Wilderness Trace Community Foundation Professional Advisor Seminar (November 2019)

"Powers of Appointment: Basics, Basis, and Beyond," 56th Annual NAEPC Advanced Estate Planning Strategies Conference (November 2019)

"Estate Planning for Professionals," Cannon Financial Teleconference Series (November 2019)

"Upstream Planning for Unused Exclusions and Ethical Considerations and Recent Developments Facing All Wealth Transfer Advisors and Current Transfer Tax Changes under the Trump Tax Cuts and Jobs Act," 56th Annual Hawaii Tax Institute (November 2019)

"Current Developments and Planning Ideas We Find Fun and Interesting," Federal Tax Institute of New England (October 2019)

"Unmaking Messes," Cannon Financial Teleconference Series (October 2019)

"Recent Developments in Charitable Planning," Florida Bar Tax Section Meeting (October 2019)

“Contemporary Uses For Life Insurance In Estate Planning,” Cannon Financial Teleconference Series (September 2019)

“Current Developments of Importance to Estate Planners,” 45th Annual Notre Dame Tax and Estate Planning Institute (September 2019)

“Practical Estate Planning with Art and Collectibles,” Bank of America Private Bank Completing the Picture of Wealth (August 2019)

“Things About Which We Should Be Fired Up, Worried, Surprised, or Shocked,” 46th Annual Midwest/Midsouth Estate Planning Institute (July 2019)

“Your Marital Agreement Toolbox,” Cannon Financial Teleconference Series (July 2019)

“Upstream and Basis Planning” and “Electronic Wills,” Anchorage Bar Association (July 2019)

“Ethics Issues In A Modern Estate Planning Practice,” Cannon Financial Teleconference Series (June 2019)

“The Uniform Fiduciary Income and Principal Act: Trust Law Finally Catches Up With Trust Practice” and “Bright Thoughts from the Luminaries Panel,” American Bar Association 2019 RPTE National CLE Conference (May 2019)

“Charitable Giving For Family Business Families,” Jewish Federation of South Palm Beach County Annual Seminar for Professionals (May 2019)

“New And Enduring Problems In Business Succession Planning,” Cannon Financial Teleconference Series (May 2019)

“Where Does Your Trust Live,” Cannon Financial Teleconference Series (April 2019)

“Making Charitable Gifts of Business Interests,” ABA Teleconference (April 2019)

"The Trust has Moved Under Your Feet: Do You Feel the Rules Tumbling Down?" and "ULC Update and Discussion - ULC UTC Redux & UFIPA and Spring Musings About Trust Law, Interesting Current and Future Issues," ACTEC 2019 Annual Meeting (March 2019)

"The Moving Target: Planning For Clients With Net Worth Over $11 Million," Cannon Financial Teleconference Series (February 2019)

"2018 Tax Developments for Estates, Gifts and Trusts," Bloomberg Tax Webinar (February 2019)

"The New 'Moderately Wealthy': Planning For Clients With Net Worth Under $11 Million," Cannon Financial Teleconference Series (January 2019)

"Navigating the New Uniform Fiduciary Income and Principal Act," American Banker’s Association Webinar (January 2019)

"Why Giving is Important Despite No Tax Advantage," Jewish Community of Louisville Life & Legacy Professional Advisory Committee (January 2019)

"Almost All You Need to Know about Powers of Appointment to Make You a Super Estate Planner," "More of What You Need to Know About Powers of Appointment," and "We Saw. We Heard. We Read. We Learned." 53rd Annual Heckerling Institute on Estate Planning (January 2019)

"Electronic Wills Act," American Bar Association Professors’ Corner Webinar (January 2019)

"Recent Developments in Estate Planning," 2018 Tennessee Federal Tax Conference (November 2018)

"Directed Trusts: Understanding the Risks and Avoiding Liability," Cannon Financial Teleconference Series (November 2018)

"To Be or Not To Be a Directed Trustee; Understanding the Duties, Responsibilities, Risks and Rewards," Cannon Financial Teleconference Series (November 2018)

"Recent Developments Facing All Wealth Transfer Advisors and Current Transfer Tax Changes Under the Trump Tax Cuts and Jobs Act," 55th Annual Hawaii Tax Institute (November 2018)

"The Shift in Planning from Estate Taxes to Income Taxes and the 2017 Tax Act," "The New Uniform Directed Trust Act" and "Charitable Giving for Family Business Families," Arizona Community Foundation and Jewish Community Foundation Tax and Legal Seminar (November 2018)

"Interesting Charitable Planning Ideas in the Post-Tax Reform Environment," 2018 Delaware Trust Conference (October 2018)

"Income Tax Considerations in Estate Planning and Estate and Trust Administration," Cannon Financial Teleconference Series (October 2018)

"Current Developments of Importance to Estate Planners," 44th Annual Notre Dame Tax & Estate Planning Institute (October 2018)

"Effective Estate and Charitable Planning With Basis On Our Minds," and "Today's Timely, Topical Tips," Dallas Jewish Community Foundation Professional Advisors Seminar (September 2018)

"Getting Money Out of Trusts: Drafting and Trust Administration Under UFIPA," ALI CLE/ACTEC webcast (September 2018)

"Obtaining Income Tax Basis and Charitable Planning in the 2018 Environment," and "Taking Advantage of the Charitable, Income Tax, and Estate Tax Gifts Congress has Given Us (Before They Wise Up)," University of North Carolina Planned Giving (September 2018)

"Back to Basis: Making Estate Planning Fun For Everyone," ACTEC 2018 Rocky Mountain Regional Meeting (September 2018)

"Making the Most of Your Client's Philanthropy: Advanced Charitable Planning Techniques and Opportunities," Society of Financial Service Professionals (August 2018)

“Nothing Succeeds Like Successful Succession,” North Carolina Bar Association Estate Planning and Fiduciary Law Section Annual Meeting (July 2018)

“Management (and Mismanagement) of Trust Assets,” Cannon Financial Teleconference series (July 2018)

“Situational Planning: Here’s What We Got; Here’s What We Do; and Why We Do This and Not That,” 45th Annual Midwest-Midsouth Estate Planning Institute (July 2018)

“Notable Developments in Estate Planning,” 45th Annual Midwest-Midsouth Estate Planning Institute (July 2018)

“All The Fun We Are Having Now: Reflections on Current Planning Opportunities and Recent Developments with a Special Emphasis on Generating New Basis,” American Institute on Federal Taxation (June 2018)

“Ethics Issues Facing Trusts and Estates Practitioners,” Cannon Financial Teleconference series (June 2018)

“Opportunities from the 2017 Tax Act”, Louisville Bar Association (June 2018)

“Recent Developments and Planning Opportunities After the Tax Act: It’s Summertime But is the Living Easy?,” 45th Annual Midwest Estate, Tax & Business Planning Institute (June 2018)

"Engaging the Next Generation of Estate Planning Clients," Cannon Financial Teleconference series (May 2018)

"Update on the New Tax Bill and its Implications for Charitable Giving," Community Foundation of Louisville's 15th Annual Professional Advisor Seminar (May 2018)

"Top Planned Giving Vehicles for 2018," Charitable Gift Planners of Kentuckiana (May 2018)

"Hot Tax Topics," Texas Bar Advanced Estate Planning Strategies (April 2018)

"Charitable Giving: Seeking the Perfect Match Between Donor and Donee," Canon Financial Teleconference Series (March 2018)

"Powers of Appointment: From Snoozy to Sexy" and "Hot Topics," ACTEC Annual Meeting, (March 2018)

"Modification and Termination of Trusts: a Double-Edged Sword," Canon Financial Teleconference Series (February 2018)

"Nothing Succeeds Like Successful Succession," Estate Planning Council of Portland (February 2018)

"Building Basis, Beyond the Basics: Effective and Efficient Basis Building Strategies for Your Client" and "Trustees, Beneficiaries, Directors! The Uniform Directed Trust Act Can Conjure a Hollywood Ending from Even the Most Difficult Family Script," 52nd Annual Heckerling Institute on Estate Planning (January 2018)

"Designing Estate Plans to Withstand Challenges," Cannon Financial Teleconference Series (January 2018)

"Contributing Business Interests to Charity," ABA RPTE (January 2018)

"Business Succession," Philadelphia Estate Planning Counsel (January 2018)

"A Comprehensive Checklist for Succession Planning," Bloomberg BNA Webinar (December 2017)

“Recent Developments,” 2017 Tennessee Federal Tax Conference (November 2017)

“Charitable Planning,” ACTEC ALI-CLE webinar (November 2017)

“Protecting Beneficiaries From Themselves and Others,” Cannon Financial Teleconference Series “live” from the Hawaii Tax Institute (November 2017)

“Incorporating New Uniform Acts, and their Principles, Into Your Practice,” Oklahoma Bar Association Estate Planning, Probate & Trust Section Annual Meeting (November 2017)

"The Match Game: Emerging Uniform Laws Compared with Delaware," the Delaware Bankers Association 2017 Delaware Trust Conference (October 2017)

"Making the Most of Your Client's Philanthropy: Advanced Charitable Planning Techniques and Opportunities," LBA Probate and Estate Law Section CLE (October 2017)

"Don't Overlook the Power of Powers," Cannon Financial Teleconference Series (October 2017)

"Best Practices in Estate Planning: How to Protect What Matters Most," Vanderbilt Reunion (October 2017)

"Nothing Succeeds Like Successful Succession," and "Giving the Business...to Charity," Central Indiana Community Foundation Professional Advisor Fall Seminar (September 2017)

"Family Business Succession Planning: Now More Challenging Than Ever," Cannon Financial Teleconference Series (September 2017)

"Estate Planning for the 99%" Cannon Financial Teleconference Series (August 2017)

"Notable Developments on Estate Planning," the 44th Annual Midwest/Midsouth Estate Planning Institute (July 2017)

"Estate Planning for and Administration of Digital Assets," Cannon Financial Teleconference Series (July 2017)

"Clarity and Comfort under the ULC's Soon to be Approved Uniform Directed Trust Act," ABA Professor's Corner webinar (June 2017)

"Business Succession Planning," ICLEF 44th Annual Midwest Estate, Tax & Business Planning Institute (June 2017)

"Change, Changes! They're Everywhere!" The Community Foundation of Southern Indiana (June 2017)

"The Junction of Excellent Estate Planning and Terrible Trust Administration," Cannon Financial (May 2017)

"Common Sense Basis Planning and Drafting Open Discussion" and "Open Discussion on Recent Developments and Responses to Tax Reform," ACTEC Southern Regional Meeting (May 2017)

"Estate and Charitable Planning in a Trump World: Are We Making America Great, or Confused, or Maybe Both?" Green River Area Community Foundation Professional Advisor Seminar (May 2017)

"Powers of Appointment," the Saint Louis Estate Planning Council (May 2017)

“Designing and Administering Estate Plans to Minimize Income Tax,” Cannon Financial Teleconference Series (April 2017)

"Panel of Luminaries - speaker," ABA section of Real Property, Trust and Estate Law Symposia (April 2017)

"Designing and Administering Trust Distribution Mechanisms," Cannon Financial Teleconference Series (March 2017)

"Estate Planning in a Trump World: Are We Making America Great, or Confused, Or Maybe Both?" Evansville Estate and Financial Planning Council (February 2017)

"Post-Mortem Tax Election Heaven," Cannon Financial Teleconference Series (February 2017)

"Charitable Giving For Family Business Families," Greater Boca Estate Planning Council (February 2017)

"Transferring Business Interests With A View Towards A Potential New Tax World," "Retaining, Obtaining, and Sustaining Basis," and "Do People Really Do That?" Johns Hopkins All Children's Hospital's 19th Annual Estate, Tax, Legal & Financial Planning Seminar (February 2017)

"Powers of Appointment," The National Association of Estate Planners & Councils (NAEPC) webinar (February 2017)

"Recent Developments," Baltimore Estate Planning Counsel (January 2017)

"Nothing Succeeds Like Successful Succession," and "Charitable Giving for Family Business Families," Heckerling Institute (January 2017)

"Current Developments in Estate and Tax Planning," ACTEC-ALI CLE Webinar (December 2016)

"Planning and Drafting for the Married Couple in an Era of Mobility, Portability, and Liability," ABA Section of Real Property, Trust and Estate Law Webinar (December 2016)

"Modern Uses of Partnerships That You Might Not Have Considered," Tennessee Federal Tax Conference (November 2016)

"It's All About Basis - Obtaining, Sustaining, Maximizing and Reporting Basis," Hawaii Tax Institute (November 2016)

"Brave! Exciting! Worrisome! The New World of Estate Planning As We Confront The Need For Income Tax Basis And The Looming Changes To Asset Valuation," 13th Annual Atlanta Estate Planning Forum (November 2016)

"Section 2704: Disregarded Restrictions? Disappearing Discounts? As the Empire Strikes Back, Can We Float Like a Butterfly and Sting Like a Bee?" 42nd Notre Dame Tax & Estate Planning Institute (October 2016)

"Directed and Delegated Trusts - The Options Available and The Risks Involved," Cannon Financial Teleconference Series (October 2016)

"Powers of Appointment in the Current Planning Environment," Duke University Estate Planning Conference (October 2016)

"Giving Business Interests to Charity," ABA Real Property, Probate and Trust Law Section Joint Meeting with the Tax Section (September 2016)

"'Super Creditor'! IRS Tools and Tactics to Collect an Unpaid Tax Liability," Cannon Financial Teleconference Series (September 2016)

"Hot Topics in Estates, Gifts and Trusts," Bloomberg BNA Webinar (September 2016)

"Valuation Vendetta: 2704 Regs Seek to Dump Discounts," Cannon Financial Teleconference Series (August 2016)

"Recent Developments in Federal Transfer Tax," Missouri Bar Association Annual Estate, Trust and Elder Law Institute (August 2016)

"Asset Protection," Cannon Financial Teleconference Series (August 2016)

"Recent Developments of Interest to Estate Planners," University of Kentucky College of Law's 43rd Annual Midwest/Midsouth Estate Planning Institute (July 2016)

"Preserving the Integrity of the Estate Plan," Cannon Financial Teleconference Series (June 2016)

"Practical & Creative Planning Series - Little Known, Highly Effective Charitable Structuring Ideas," Bloomberg BNA Webinar (May 2016)

"The Sometimes Complicated World of Charitable Giving," Cannon Financial Teleconference Series (May 2016)

"Charitable Giving in the New Estate Planning Environment," Queens University of Charlotte 38th Annual Estate Planners Day (May 2016)

"Life Insurance Revisited," Cannon Financial Teleconference Series (April 2016)

"Avoiding the Estate Planning 'Blue Screen of Death' with Competent and Ethical Practices - Part II," The Kansas City Estate Planning Symposium (April 2016)

"Ethics Issues Arising in Estate Planning for Those in Different Family Contexts," Cannon Financial Teleconference Series (March 2016)

"Planning Opportunities for 501(c)(4) Organizations Under 2015 PATH Act" ACTEC 2016 Annual Meeting (March 2016)

"Professionalism in Estate Planning" Cannon Financial Teleconference Series (February 2016)

"Charitable Planning Techniques That Allow Uncle Sam to Contribute to Your Family and Charities" Bloomberg BNA Webinar (February 2016)

"Recent Developments" Portland Estate Planning Council Estate Planning Seminar (February 2016)

"Planning and Drafting for the Married Couple in an Era of Mobility, Portability, and Liability" Cincinnati Estate Planning Council (February 2016)

"Estate Planning in 2016" Cannon Financial Teleconference Series (January 2016)

"Planning and Drafting for the Married Couple in an Era of Mobility, Portability, and Liability" Heckerling Institute on Estate Planning (January 2016)

"When $25 Million is Middle Class, How Should We Plan and Draft for the Middle Class Married Couple?" Heckerling Institute on Estate Planning (January 2016)

"Lawyer's Role on Non-Profit Boards" LBA Leadership Academy (December 2015)

"Ethics Issues in Trust Administration" Cannon Financial Teleconference Series (December 2015)

"Successfully Implementing Your Client's Charitable Intent" ACTEC/ALI-CLE telephone seminar (November 2015)

"Business Succession or Business Cessation? Passing the Torch Without Dousing the Flame" 52nd Annual Hawaii Tax Institute (November 2015)

"Charitable Planning in the New Estate Planning Environment" The Estate Planning Council of Seattle and University of Washington School of Law's Graduate Program in Taxation 60th Annual Estate Planning Seminar (November 2015)

"The New Uniform Fiduciary Access to Digital Assets Act: An Overview by the Drafters" WealthManagement.com's Trusts & Estates Practice Management Webinar (November 2015)

"Taking the UTC Down The Pacific Coast Highway: Twists, Turns, Beautiful Views and Perilous Cliffs" American College of Trust and Estate Counsel (October 2015)

"Post-Mortem Estate Planning" Cannon Financial Teleconference Series (October 2015)

"Designing Charitable Giving Strategies for New Age Estate Planning" Richmond Jewish Foundation's 10th Annual Hirschler Professional Advisors Seminar (October 2015)

"Multi-State Trust Issues or Trust Situs Selection and Design Opportunities: Factors to Consider in Addition to Creditor Protection" Notre Dame 41st Annual Tax and Estate Planning Institute (September 2015)

"Powers of Appointment" Southern Arizona Estate Planning Council (September 2015)

"The Ascendancy of Income Tax Planning" Cannon Financial Teleconference Series (September 2015)

"Planning Considerations in the Current Environment" Southern Indiana Estate Planning Council (September 2015)

"Outsmart Your Competition: Understand Charitable Insights And Vehicles" Fidelity Charitable Webinar (September 2015)

“Working With Disabled Clients and a Client’s Disabled Family Members” Cannon Financial Teleconference Series (August 2015)

“State Income Tax Issues With Trusts” Cannon Financial Teleconference Series (July 2015)

“Notable Developments of Interest to Estate Planners” University of Kentucky 42nd Annual Midwest-Midsouth Estate Planning Institute (July 2015)

"Charitable Planning in the New Estate Planning Environment” The Green River Area Community Foundation (June 2015)

"Closely Held Business Succession Planning - Opportunities and Challenges” Cannon Estate Planning Teleconference Series (June 2015)

"Ethics Issues in Estate Planning” Cannon Estate Planning Teleconference Series (May 2015)

“Retaining, Obtaining, and Sustaining Basis”; “Things We Think We Know About Estate Planning, But Are We Sure?”; and “Charitable Planning Ideas in the Current Environment” 55th Annual Probate & Estate Planning Institute - Probate & Estate Planning Section of the State Bar of Michigan (May 2015)

"Current Planning Issues In A Grantor Trust World” ALI-CLE Seminar Webcast (May 2015)

"Hot Topics” ABA Real Property, Trust and Estate 2015 Spring Symposia (April 2015)

"Trust Issues in Family Law” American Academy of Matrimonial Lawyers (April 2015)

"Giving Until it Feels Great!" Community Foundation of Southern Indiana (April 2015)

"Best Designs for the Exercise of Trustee Discretion” Cannon Financial Teleconference Series (March 2015)

"Giving the Business...to Charity” ACTEC 2015 Annual Meeting (March 2015)

"Charitable Giving in the New Estate Planning Environment” Central Kentucky Planned Giving Council (February 2015)

"Powers of Appointment in the Current Planning Environment” Heckerling Institute on Estate Planning (January 2015)

“Recent Tax Developments for Estate Planners” American Law Institute CLE – ACTEC Teleconference on Estate and Gift Tax Recent Developments (December 2014)

“Future of Estate Planning and Fiduciary Services” Cannon Financial Institute, Inc., The 2014 Estate Planning Teleconference Series (December 2014)

“Uniform Laws: Changing Estate Planning Practice Across the Nation” ALI-CLE Telephone seminar/audio webcast (November 2014)

“Notable Developments of Interest to Estate Planners” Tennessee Federal Tax Conference (November 2014)

“Notable Developments of Interest to Estate Planners” Evansville Bar Association (November 2014)

“Retaining, Obtaining and Sustaining Basis and Venn Diagrams: The Intersection of Estate & Income Tax” 40th Annual Notre Dame Tax & Estate Planning Institute (November 2014)

“The Uniform Trust Code and Charitable Giving and Community Foundations” Foundation for the Tri-State Community (November 2014)

“Doing Well By Doing Good: Integrating Charity Into Your Estate Plan” United Way Foundation of Indian River County/Indian River Community Foundation (October 2014)

“Recent Cases, Regulations, Rulings, and Pronouncements” Southern Federal Tax Institute Annual Meeting (October 2014)

“Professional Liability and Ethics in Trusts and Estates”, Cannon Financial Institute, Inc., The 2014 Estate Planning Teleconference Series (October 2014)

“Charitable Giving in the New Estate Planning Environment” Jewish Federation of Greater Philadelphia’s Bronstein Seminar for Professionals (October 2014)

“Estate Planning in the New World Order: What to do Now That Estate Planning is More Complex than Ever. Your Client May Not Have an Estate Tax Problem but What About Income Tax?” Colorado Bar Association 25th Advanced Estate Planning Symposium (September 2014)

“Who Wants This Job? Selection of Trustees and Other Fiduciaries” Cannon Financial Institute, Inc., The 2014 Estate Planning Teleconference Series (August 2014)

“2014 Planning With 99 Year GRATs, 33 Year CLATs, and UPSPATS that are Ready To Go!” National Association Of Estate Planners & Councils Webinar Series (August 2014)

“Notable Developments in Estate Planning” University of Kentucky 41st Annual Midwest-Midsouth Estate Planning Institute (July 2014)

“What Every Estate Planner and Fiduciary Needs to Know About the UTC” Cannon Financial Institute, Inc., The 2014 Estate Planning Teleconference Series (July 2014)

“Donor-Centric Philanthropy: Mixing and Matching Private Foundations, Donor Advised Funds, and Supporting Foundations” ALI CLE Charitable Planning Techniques (June 2014)

“Don't Forget Your Property Law: Uniform Prudent Management of Institutional Funds Act, Legal and Accounting Requirements, and other State Law Topics” ALI CLE Charitable Planning Techniques (June 2014)

“Grantor Trusts” Texas Bar CLE 38th Annual Advanced Estate Planning & Probate Course (June 2014)

“Charitable Planning Strategies for Non-Traditional Unions” Society of Financial Service Professionals/American Cancer Society (June 2014)

“Pitfalls and Pots of Gold: Ethical Considerations with Charitable Giving” Partnership for Philanthropic Planning Kentuckiana (June 2014)

“Ethics Considerations for the Trust and Estate Practitioner” Cannon Financial Institute, Inc., The 2014 Estate Planning Teleconference Series (May 2014)

"Charitable Planning in the Current Tax and Personal Planning Environment" The Community Foundation of Western North Carolina 23rd Annual Professional Seminar (May 2014)

“Updates in Estate Planning Topics for 2014” Bluegrass Estate Planning Council (May, 2014)

“Deft Diplomacy – Designing and Administering Discretionary Trusts” Cannon Financial Institute, Inc., The 2014 Estate Planning Teleconference Series (April 2014)

“Planning for 2014 and Beyond” Memphis Chapter of the Society of Financial Service Professionals (April 2014)

“Fixing a Broken Estate Plan” Cannon Financial Institute, Inc., The 2014 Estate Planning Teleconference Series (February 2014)

"The Role of Federal Law in Private Wealth Transfer" The Vanderbilt Law Review Spring 2014 Symposium (February 2014)

"Things You Think You Know about Estate Planning: Myths and Mistakes" ALI CLE Advanced Estate Planning Techniques (February 2014)

“Recent Developments of Interest to Estate Planners” Estate Planning Council of Portland 43rd Annual Estate Planning Seminar (January 2014)

“Charitable Lead Trusts, For Fun, For Profit, For Good” USC Gould School of Law 2014 Tax Institute (January 2014)

“Hot Topics in Estate and Gift Tax Planning” USC Gould School of Law 2014 Tax Institute (January 2014)

“Estate Planning Strategies for 2014” Cannon Financial Institute, Inc., The 2014 Estate Planning Teleconference Series (January 2014)

“Recent Developments for Fiduciaries 2014” 48th Annual Heckerling Institute on Estate Planning (January 2014)

“Charitable Giving in the New Estate Planning Environment” 48th Annual Heckerling Institute on Estate Planning (January 2014)

“Charitable Planning Today” 48th Annual Heckerling Institute on Estate Planning (January 2014)

"Ethics" Cannon Financial Institute, Inc., The 2013 Estate Planning Teleconference Series (December 2013)

“Notable Developments in Estate Planning” Tennessee Federal Tax Conference (November 2013)

“Notable Developments in Estate Planning” 24th Annual Evansville Bar Association Estate and Business Institute (November 2013)

"Charitable Planning Ideas in a World of Lower Estate Taxes and Higher Income Taxes" Planned Giving Council of Middle Tennessee (November 2013)

"Charitable Giving" Cannon Financial Institute, Inc., The 2013 Estate Planning Teleconference Series (November 2013)

"Estate Planning in 2014" Physician Seminar with U of L & Jewish Hospital & St. Mary's Foundation (November 2013)

“Notable Developments in Estate Planning” Stock Yards Bank Estate & Tax Seminar (October 2013)

"Retaining, Obtaining, and Sustaining Basis" University of Montana Tax Institute (October 2013)

"Retaining, Obtaining, and Sustaining Basis" Notre Dame Tax & Estate Planning Institute (October 2013)

"Annual Exclusion" Cannon Financial Institute, Inc., The 2013 Estate Planning Teleconference Series (September 2013)

"Connecting with Kentucky's Challenges" 2013 KY Summit on Philanthropy (September 2013)

“Estate Planning for Non-Married Clients” Cannon Financial Institute, Inc., The 2013 Estate Planning Teleconference Series (August 2013)

“Notable Developments in Estate Planning” 40th Annual Midwest/Midsouth Estate Planning Institute (July 2013)

“Estate Planning for the rich, the poor, and the folks next door” LBA Probate & Estate Section (June 2013)

“Your Best Charitable Giving Techniques for 2013” 37th Annual American Institute on Federal Taxation (June 2013)

“Business Succession or Business Cessation? Passing the Baton to the Next Generation” Cannon Financial Institute, Inc., The 2013 Estate Planning Teleconference Series (June 2013)

“Planned Giving; Gift-Giving and Fundraising Issues” National Business Institute Event: Tax Exempt Organizations From Start to Finish (June 2013)

“Selected Legal Aspects of Non-Profit Corporations” Get on Board-Center for Nonprofit Excellence (May 2013)

“Current Developments” University of Louisville 16th Annual Estate Planning Institute (May 2013)

“Charitable Planning Strategies and Ideas” Owensboro - Green River Area Community Foundation (May 2013)

“Ethics” Cannon Financial Institute, Inc., The 2013 Estate Planning Teleconference Series (April 2013)

“Trust and Estate Practice: Planning Ahead" Attorneys Liability Assurance Society Inc Webcast (April 2013)

“Symposium II: The Bigger They Are, The Harder They Fall Unless We Work Hard To Make Them Small” ACTEC 2013 Annual Meeting (March 2013)

“Estate Planning Techniques that Make Sense in 2013” Cannon Financial Institute, Inc., The 2013 Estate Planning Teleconference Series (February 2013)

“Estate Tax Updates for 2013” Bluegrass Estate Planning Council (February, 2013)

“Tricks and Traps in Disclaimers - Including the Use of Defined Value Clauses” Cannon Financial Institute, Inc., The 2013 Estate Planning Teleconference Series (January 2013)

“A New Year. A New Congress. New Plans? Old Ideas?” Central Kentucky Planned Giving Council (January 2013)

"Fiduciary Litigation Update” Heckerling Institute on Estate Planning (January, 2013)

“Tax Legislation In The Lame Duck Congressional Session” Southern Federal Tax Institute Webinar (December 2012)

"Recent Developments in Estate Planning: Round 2” - Cannon Financial Institute, Inc., The 2012 Estate Planning Teleconference Series (December 2012)

“Achieving Landowner Goals” Louisville Bar Association (December 2012)

“Recent Developments of Interest to Estate Planners” 23rd Annual Estate and Business Planning Institute, Evansville Bar Association (November 2012)

“Recent Developments of Interest to Estate Planners” Tennessee Society of CPAs Federal Tax Conference (November 2012)

"Recent Developments for Fiduciaries” 57th Annual Estate Planning Seminar, Washington State Bar Association (November 2012)

"What You Don’t Know Can Hurt You: Estate Planning Opportunities For 2012 That (May) Disappear On January 1, 2013"University of Louisville Foundation, Inc. (November 2012)

"Notable Developments of Interest to Estate Planners" Stock Yards Bank Estate and Tax Seminar (October 2012)

"Notable Developments of Interest to Estate Planners" 34th Annual Duke University Estate Planning Conference (October 2012)

"Notable Developments of Interest to Estate Planners" Boys & Girls Club of Metro Atlanta (October 2012)

"Making a Difference in Advising Philanthropic Clients" Cannon Financial Institute, Inc., The 2012 Estate Planning Teleconference Series (October 2012)

"Litigation Update: Why the Competence and Predictability of the Court of Chancery Is the Real Delaware Advantage" Delaware Bankers Trust Conference (October 2012)

"Notable Developments of Interest to Estate Planners" Estate Planning Council of Memphis (September 2012)

"Fiduciary Case Law Update" Notre Dame Tax & Estate Planning Institute (September 2012)

"Timeless and Timely Topics, Tips and Tidbits: A Tax and Legal Review" Practical Planned Giving Conference (September 2012)

"Correcting Acts of Self Dealing" ABA Real Property, Probate and Trust Law Section Joint Meeting With The Tax Section (September 2012)

"Trust Funding Issues from the Trenches" Cannon Financial Institute, Inc., The 2012 Estate Planning Teleconference Series (August 2012)

"Fiduciary Responsibilities for Endowment and Retirement Funds" KyCPA Non-Profit Conference (August 2012)

"Recent Development of Interest to Estate Planners" UK Midwest/Midsouth Estate Planning Institute (July 2012)

"Passing the Torch Without Dousing the Flame: Estate Planning for Closely-Held Business Owners" Cannon Financial Institute, Inc., The 2012 Estate Planning Teleconference Series (June 2012)

"How To Lower The High Cost Of Dying: Estate Planning In Uncertain Times" Jewish Community Board of Akron (May 2012)

"Selecting the Best Charitable Donee" Birmingham Estate Planning Council (May 2012)

"Making the CLT your New Best Friend" Partnership for Philanthropic Planning In Kentuckiana (May 2012)

"Recent Developments of Interest in Charitable Planning" American Council on Gift Annuities (April 2012)

"Charitable Gift Planning Options in an Uncertain World" University of Southern California 2012 Trustee Conference (March 2012)

"Getting Ready for April 15th—Trust Income Tax Issues Faced by Estate Planning Practitioners" Cannon Financial Institute, Inc., The 2012 Estate Planning Teleconference Series (March 2012)

"Sorting, Sifting, and Synthesizing What You Know About Estate Planning" All Children's Hospital Foundation Estate Tax Seminar (February 2012)

"Notable Developments of Interest to Estate Planners" 41st Annual Estate Planning Seminar, Estate Planning Council of Portland, Oregon (February 2012)

"Recent Developments for Fiduciaries" Heckerling Institute on Estate Planning (January 2012)

"Notable Developments of Interest to Estate Planners - 2011" Bluegrass Estate Planning Council (January 2012)

"Divided Trusteeships Across Donative and Commercial Trusts" Delaware Bankers Association 2011 Delaware Trust Conference (November 2011)

"Notable Developments of Interest to Estate Planners - 2010-2011" Evansville Bar Association Estate & Business Planning Institute (November 2011)

"Charitable Planning" Cannon Financial Institute, Inc., The 2011 Estate Planning Teleconference Series (November 2011)

"Notable Developments of Interest to Estate Planners - 2010-2011" 2011 Tennessee Federal Seminar (November 2011)

"Notable Developments of Interest to Estate Planners - 2010-2011" Maryland Advanced Tax Institute (October 2011)

"Fiduciary Litigation and Uniform Law Update: UTC Litigation, Other Litigation, the Power of Attorney Act, and a Preview of Issues in the Premarital and Marital Agreements Act" So. California Tax & Estate Planning Forum (October 2011)

"Notable Developments of Interest to Estate Planners - 2010-2011" Stock Yards Bank Estate and Tax Seminar (October 2011)

"Current Legal and Practical Issues Facing Foundations" Kentucky Summit on Philanthropy (October 2011)

"Thinking About Long-Term and Perpetual Trusts" Central Indiana Community Foundation (October 2011)

"Breaking the Mold: Options in Traditional Endowment Design" Partnership for Philanthropic Planning (October 2011)

"Fiduciary Law and Transfer Tax Update" Wyatt, Tarrant, & Combs, LLP, (September 2011)

“Charitable Planning in 2011 and Beyond” Southern Federal Tax Institute (September 2011)

"The Central Insights of Wealth Transfer Strategies a Common Sense Approach to Thinking About Estate Planning” The 37th Annual Notre Dame Tax and Estate Planning Institute (September 2011)

"Immortality and the Law: Theory and Practice” ALI-ABA Sophisticated Estate Planning Techniques (September 2011)

“Disclaimers” Cannon Financial Institute, Inc., The 2011 Estate Planning Teleconference Series (September 2011)

“Lawyer's Role on Nonprofit Boards” LBA Leadership Academy (August 2011)

“Fiduciary Law Developments, Summer 2011” BB&T University Wealth Learning & Development, Louisville, KY (August 2011)

"Coordinating Legal Aspects of Estate Planning with Financial Planning” Cannon Financial Institute, Inc., The 2011 Estate Planning Teleconference Series (August 2011)

“Recent Charitable Planning Strategies for Families in Uncertain Times” Georgia Federal Tax Conference (June 2011)

"Estate Planning for Professionals, Including Doctors, Lawyers, Accountants, Professors, Etc.” Cannon Financial Institute, Inc., The 2011 Estate Planning Teleconference Series (June 2011)

“Fiduciary Follies, Foibles, and Fun” 2011 Indiana Banker’s Association Mega Conference (May 2011)

“How to Lower the High Cost of Dying” Berea College Life Planning Workshop (May 2011)

“How to Lower the High Cost of Dying” University of Louisville Golden Alumni 2011 Reunion (May 2011)

“Issues in Fiduciary Litigation – How to Minimize Exposure” South Carolina Bankers Association 2011 Trust Conference (April 2011)

“Timely Tips and Topical Tidbits: Reflection and Comment on Interesting Ideas and Developments in the Current Environment” University of Louisville 14th Annual Estate Planning Institute (April 2011)

“Hot Topics in Fiduciary Liability: Avoiding Traps, Thickets and Tax Balls” Connecticut Open Bar Section Meeting (April 2011)

"Notable Developments of Interest to Estate Planners” Blue Grass Estate Planning Council (February 2011)

“The Whether, Why, Whom, What and When of the Trustee’s Duty to Notify Beneficiaries:, 45th Annual Heckerling Institute on Estate Planning (January 2011)

"Charitable Planning And Other Fun Ideas Of Interest To Estate Planners" Southern Arizona Estate Planning Council (December 2010)

"Notable Developments in Estate Planning" Evansville Bar Association (November 2010)

"Notable Developments in Estate Planning" Tennessee Tax Conference (November 2010)

"Notable Developments in Estate Planning" Maryland Advanced Tax Institute (November 2010)

"Notable Developments in Estate Planning" Stock Yards Bank Estate and Tax Seminar (October 2010)

"Hot Topics in Fiduciary Liability: Avoiding Traps, Thickets and Tax Balls" 2010 Duke University Estate Planning Conference (October 2010)

"Exit Strategies: If You Can't Get Out, Should You Get In?" Partnership for Philanthropic Planning (October 2010)

"Charitable Gifts of Business Interests" Southern Federal Tax Institute (September 2010)

"Charitable Planning Strategies for Individuals and Families in Changing and Uncertain Times" Cleveland Community Foundation (September 2010)

"Selecting the Best Charitable Donee: Public Charity, Donor Advised Fund or Private Foundation" ALI-ABA (September 2010)

"UPMIFA - UPMIFA: No Panacea But Possibilities, Pitfalls, and Pratfalls; Center for Nonprofit Excellence (September 2010)

"UPMIFA: Uplifting, Upsetting, or Up-in-the-Air?" KY CPA Non-Profit Conference (August 2010)

"Notable Developments in Estate Planning" 37th Annual Midwest/Midsouth Estate Planning Institute, University of Kentucky College of Law (July 2010)

"UPMIFA: Uplifting, Upsetting, or Up-in-the-Air?" Central Kentucky Planned Giving Council (May 2010)

"New Estate Planning & Probate Statutes add Clarity, Confusion, Possibilities and Pitfalls" Louisville Bar Association (May 2010)

Best Ideas Workshop, Cincinnati Estate Planning Council/The Greater Cincinnati Foundation (May 2010)

"Beat the Busted Buy-Sell: The Ten Common Mistakes in Planning, Drafting and Implementing Buy-Sell Agreements" Kentucky Bar Association 20th Annual Issues for Corporate House Counsel CLE Seminar (April 2010)

"Selecting the Best Donee: Public Charity, Donor Advised Fund, or Private Foundation" The ACTEC 2010 Annual Meeting (March 2010)

"Integrating Charitable and Estate Planning: To Do Well As You Do Good" 12th Annual Estate, Tax, Legal & Financial Planning Seminar, All Children's Hospital Foundation, Tampa, Florida (February 2010)

"Charitable Planning with Closely-Held Businesses" 44th Annual Heckerling Institute on Estate Planning (January 2010)

"Comments on Estate Tax Repeal" 39th Annual Estate Planning Seminar, Estate Planning Council of Portland, Inc. (January 2010)

"Estate and Charitable Planning" Lincoln Heritage Council (Boy Scouts) (November 2009)

"Recent Developments of Interest to Estate Planners" 2009 Tennessee Federal Tax Conference, Tennessee Society of CPAs and Tennessee Federal Tax Institute (November 2009)

"Recent Developments of Interest to Estate Planners" West River Estate Planning Council, Rapid City, South Dakota (November 2009)

"Recent Developments of Interest to Estate Planners" Advanced Tax Institute, Maryland Association of CPAs (November 2009)

"Incentive Trusts for Children" ALI-ABA, Live Telephone Seminar/Live Audio Webcast (October 2009)

"Recent Developments of Interest to Estate Planners" Stock Yards Bank Estate and Tax Seminar (October 2009)

"Recent Estate and Charitable Developments" The Jewish Community Endowment Fund (Albany, New York) (September 2009)

"Fiduciary Concerns in a Litigious Environment" Estate Planning Council of Louisville (September 2009)

"Charitable Planning and Exempt Organization Developments" ACTEC Southeast Region Meeting (September 2009)

"Recent Developments of Interest to Estate Planners" 36th Annual Midwest/Midsouth Estate Planning Institute, University of Kentucky College of Law (July 2009)

"Recent Developments of Interest to Estate Planners" 36th Annual Midwest Estate Tax and Business Planning Institute" Indiana Continuing Legal Education Foundation (June 2009)

"Preserving Family Assets – The Marriage of Business Planning and Charitable Planning" Greater Milwaukee Foundation, Milwaukee, WI (May 2009)

"Tax Issues and Selecting the Appropriate Charitable Entity for Charitable Planning" Alabama Planned Giving Council, Birmingham, AL (June 2009)

"Tax Issues and Selecting the Appropriate Charitable Entity for Charitable Planning" American Institute on Federal Tax (June 2009)

"Integrating Charitable and Estate Planning: Doing Well by Doing Good" 18th Annual Trust Advisors Forum (February 2009)

"Notable Developments of Interest to Estate Planners" Bluegrass Estate Planning Council (January 2009)

"Recent Developments of Interest to Estate Planners" Tennessee Federal Tax Conference, Tennessee Society of CPAs and Tennessee Federal Tax Institute (December 2008)

"Recent Developments of Interest to Estate Planners" "Enforcing the Charitable Restrictions Your Clients Care About" and "Interesting New Charitable Planning Ideas" Kentucky Planned Giving Council (December 2008)

"Recent Developments of Interest to Estate Planners" 19th Annual Estate and Business Planning Institute, Evansville Bar Association (November 2008)

"Recent Developments of Interest to Estate Planners" Annual Joint Program of the Monroe County Bar Association and the Estate Planning Council of Rochester, NY (November 2008)

"Recent Developments of Interest to Estate Planners" 2008 Advanced Tax Institute, Maryland Association of CPAs (November 2008)

"Recent Developments of Interest to Estate Planners" Stock Yards Bank & Trust Estate & Tax Seminar, Jeffersonville, IN (October 2008)

"Matching Techniques, Donors, and Donees" Kentucky Nonprofit Leadership Forum, Lexington, KY (October 2008)

"Private Foundations, Donor Advised Funds, or Supporting Organizations: The Taxpayer Conundrum" Connecticut Bar Association Open Meeting, New Haven, CT (October 2008)

"Restricted Charitable Gifts" Tulane University (September 2008)

"Private Foundations, Donor Advised Funds, or Supporting Organizations: The Taxpayer Conundrum" 43rd Annual Southern Federal Tax Institute (September 2008)

"Donor Centered Philanthropy: Imposing and Enforcing Restrictions" ALI-ABA Sophisticated Estate Planning Techniques (September 2008)

"Recent Developments of Interest to Estate Planners" 35th Annual Midwest/Midsouth Estate Planning Institute, University of Kentucky College of Law (July 2008)

"Estate Planning at Poolside: Early Summer Musings, Meditations and Flights of Fancy" Louisville Bar Association Probate & Estate Section (June 2008)

"Recent Developments of Interest to Estate Planners" 35th Annual Midwest Estate Tax and Business Planning Institute" Indiana Continuing Legal Education Foundation (June 2008)

"Preserving Family Assets: The Marriage of Estate Planning and Charitable Giving" Greater Cincinnati Foundation Seminar (June 2008)

"Financial Planning Update" Kentucky Society of CPAs (May 2008)

"Estate Planning Issues for the Horse Owner" University of Kentucky 23rd Annual National Conference on Equine Law (April 2008)

"Recent Developments of Interest to Fiduciaries" National City Bank Trust Conference (May 2008)

"Recent Developments of Interest to Estate Planners" North Dakota Bankers Association Tri-State Trust Conference (April 2008)

"Estate Planning Considerations in Corporate Liquidity Events" KBA Corporate House Counsel Section 18th Annual Issues for Corporate House Counsel CLE (April 2008)

BNA Tax Management Seminar, "2007 Developments of Interest to Estate Planners" (February 2008)

Uniform Probate Code Developments, A Practitioner's Perspective, UCLA (February 2008)

"Recent Developments of Interest to Estate Planners" Estate Planning Council of Portland (January 2008)

"Ten Common Mistakes in Drafting Buy-Sell Agreements" ACTEC Southeastern Regional Meeting (November 2007)

"Recent Developments of Interest to Estate Planners" Tennessee Federal Tax Conference, Tennessee Society of CPAs, Nashville, TN, (December 2007)

"Recent Developments of Interest to Estate Planners" 2007 Advanced Tax Institute, Maryland Association of CPAs, Baltimore, MD, (November 2007)

"Recent Developments of Interest to Estate Planners" Bluegrass Estate Planning Council, Lexington, KY (November 2007)

"Recent Developments of Interest to Estate Planners" Evansville Bar Association, Evansville, IN (November 2007)

"Recent Developments of Interest to Estate Planners" 29th Annual Duke University Estate Planning Conference, Durham, NC (October 2007)

"The Getting Part of Giving: What Happened to My Charitable Deduction?" The 42nd Annual Southern Federal Tax Institute, Atlanta, GA (October 2007)

"Recent Developments of Interest to Estate Planners" Midwest/Midsouth Estate Planning Institute, University of Kentucky College of Law, Lexington, KY (July 2007)

"2006-2007 Recent Developments of Interest to Estate Planners" 34th Annual Midwest/Midsouth Estate Planning Institute" Indianapolis, IN (June 2007)

“Estate Litigation: What Every Attorney Needs to Know about Probate & Estate Planning” Kentucky Bar Association Annual Convention, Louisville, KY (June 2007)

“Update on Estate and Trust Issues” Fratcher Estate and Trust Symposium, University of Missouri, Columbia, MO (May 2007)

“Innovative Charitable Planning Ideas” Ohio Fellows ACTEC , Cincinnati, OH (April 2007)

”We’ll Sell the Business If We Can Pay No Tax” 2007 ACTEC Annual Meeting, Scottsdale, AZ (March 2007)

"Notable Developments of Interest to Estate Planners” Eighth Annual Vincennes University Wills, Trusts, and Ethics Institute (December 2006)

"Recent Developments of Interest to Estate Planners” Evansville Bar Association (November 2006)

"Recent Developments of Interest to Estate Planners” Maryland Association of CPAs (November 2006)

"Preserving Family Assets: The Marriage of Estate Planning and Charitable Giving” Gulf Coast Community Foundation (November 2006)

“Wills for Heroes” Kentucky Bar Association Young Lawyers Section (October 2006)

"Recent Developments of Interest to Estate Planners” Stock Yards Bank Estate and Tax Seminar (October 2006)

"Notable Developments of Interest to Estate Planners” Sisters of St. Benedict (October 2006)

“Annual Uniform Trust Code Conference - Drafting for States Which Lack the UTC” ACTEC 2006 Fall Meeting, Providence, RI (October 2006)

"Recent Developments of Interest to Estate Planners” Middle Tennessee Estate Planning Council (October 2006)

“Uniform Law Developments and Other Things On My Mind” Estate Planning Council of Louisville, Louisville, KY (September 2006)

“Wait, Wait, Can I Do That? – A Critical View of Challenging Charitable Planning Techniques” (with Martin Hall) and "On the Edge or Into the Abyss: Can Charity Begin at Home and End There Too?” 21st Annual Advanced ALI-ABA Course of Study - Sophisticated Estate Planning Techniques (September 2006)

"Notable Developments of Interest to Estate Planners and Other Fascinating Topics” Louisville Bar Association Probate Section (September 2006)

“Recent Developments of Interest to Estate Planners” Midwest/Midsouth Estate Planning Institute, University of Kentucky College of Law, Lexington, KY, (July 2006)

“Notable Developments of Interest to Estate Planners” 33rd Annual Midwest/Midsouth Estate Planning Institute” Indianapolis, IN (June 2006)

“Preserving Family Assets: The Marriage of Estate Planning and Charitable Giving” 20th Annual Southern Region Meeting of ACTEC Fellows, Memphis, TN (April 2006)

"On the Edge or Into the Abyss: Can Charity Begin at Home and End There, Too?" (with Martin Hall and Sara Sadler), American College Of Trust And Estate Counsel 2006 Annual Meeting (March 2006)

“Recent Developments of Interest to Estate Planners” Estate Planning Council of Portland 35th Annual Estate Planning Seminar, Portland, OR (January 2006)

“Recent Developments of Interest to Estate Planners” University of Louisville Louis A. Grief Tax Institute (December 2004)

“Recent Developments of Interest to Estate Planners” Birmingham Estate Planning Council (December 2004)

“Recent Developments of Interest to Estate Planners” Evansville Bar Association (November 2004)

“Recent Developments of Interest to Estate Planners” Maryland Association of CPAs 2004 Advanced Tax Institute Conference (November 2004)

“Families Who Do Good May Also Do Well” Kentucky Society of CPAs (November 2004)

“Tax Developments for Fiduciaries” National City Bank Fiduciary Officers Conference (October 2004)

“Recent Developments of Interest to Estate Planners” Duke Estate Planning Conference (October 2004)

“Preserving Family Assets: The Marriage of Estate Planning and Charitable Giving” The Community Foundation of Muncie and Delaware County, Inc. (October 2004)

“Preserving Family Assets: The Marriage of Estate Planning and Charitable Giving” The Madison County Community Foundation (October 2004)

“Recent Developments of Interest to Estate Planners” American College of Trust and Estate Counsel, Mid-Atlantic Regional Meeting (September 2004)

“Recent Developments of Interest to Estate Planners” American Banker’s Association Advanced Trust School (August 2004)

“Transferring Business Interests to Charity” American College of Trust and Estate Counsel, Annual Meeting, San Antonio, Texas (March 2004)

“Recent Developments of Interest to Estate Planners” Estate Planning Council of Portland, Oregon (January 2004)

"Recent Developments of Interest to Estate Planners" Healthcare Financial Management Association, Lexington, Kentucky (January 2004)

"Recent Developments of Interest to Estate Planners" 27th Annual Midwest Estate, Tax & Business Planning Institute. Indiana Continuing Legal Education Forum (June 2000-2007 2009)

"Recent Developments of Interest to Estate Planners" Georgetown University Law Center (October 1999 - 2003)

"Recent Developments of Interest to Estate Planners" University of Louisville Louis A. Grieb Tax Institute (December 2003)

"Recent Developments of Interest to Estate Planners" Maryland Association of CPAs 2003 Advanced Tax Institute Conference (November 2003)

"Recent Developments of Interest to Estate Planners" Evansville Bar Association (November 2003)

"Recent Developments of Interest to Estate Planners" and "Advanced Estate Planning and Charitable Techniques" Estate Planning Council, Eugene, Oregon (May 2003)

"Preserving Family Assets: The Marriage of Estate Planning and Charitable Giving" North Central Planned Giving Council, Ashland University (November 2002)

"Advanced Charitable Techniques" The Estate Planning Council of Portland, Oregon (October 2002)

"Fall Estate Planning Update" National video seminar, ALI-ABA (September 2002)

"Preserving Family Assets: The Marriage of Estate Planning and Charitable Giving" Palm Beach Community Foundation (September 2002)

"Advanced Charitable Planning" Fall Conference for Community Foundations, Council on Foundations (2000 2001)

"Notable Developments of Interest to Estate Planners" Portland, Oregon (January 2000)

"Estate Freezes: GRATs, Sales to Grantor Trusts, and Appreciation Transfer Trusts" 26th Annual Midwest Estate, Tax & Business Planning Institute, Indiana Continuing Legal Education Forum (1999)

"Using Family Limited Partnership in Estate Planning" Evansville Estate Planning Council (1998)

"The Law and Lore of Family Foundations. Understanding the Possibilities and Pitfalls" 1998 Fall Seminar, American College Of Trust And Estate Counsel, Cleveland, Ohio (1998)

"Planning for Reality: Is it Possible to be Fair to Both the Current and Future Trust Beneficiaries?" Advanced Estate Planning Institute, Georgetown University, Washington, D.C. (1998)

“Current Issues in Charitable Giving” Estate Planning Council of Portland (1998)

“Understanding and Planning To Minimize the Generation Skipping Transfer Tax” 25th Annual Midwest Estate, Tax & Business Planning Institute, Indiana Continuing Legal Education Forum (1998)

“How To Market Your Product: Operating a Successful Estate Planning Practice” Estate Planning Section, Commercial Law Affiliates (1997)

“Integrating Estate Planning and Charitable Goals” Palm Beach Estate Planning Council (1996)

“Recent Developments of Interest to Estate Planners” University of Denver Advanced Estate Planning Symposium (1995, 1997, 1999 2001 2003 2005 2007 2009)

“Gilding the Golden Years” U of L Golden Alumni, Louisville, KY (May, 1995 - 2009)

“Supporting Organizations: An Attractive Alternative to the Private Foundation” and “Gift Annuities in the 1990's” Council on Foundations (Fall 1995)

“Tax Planning and The Planned Giving Professional” 25th Annual CASE/NAIS Independent Schools Conference, Charleston, SC (April 1995)

“Recent Developments of Interest to Estate Planners" - Midwest/Midsouth Estate Planning Seminar. University of Kentucky (July 1992-2017)

“Recent Developments of Interest to Estate Planners” Louisville Bar Association (1992-2008)

"Tax Planning Techniques for Potential Audits and Litigation” University of Kentucky Estate Planning Institute (July1988)

"Oral Decision Making and the Structure of Roman Law” Annual Meeting, Classical Association of the Middle West and South, New Orleans, LA (with Ronald J. Mann) (April 1988)

“Kentucky Probate and Trust Developments” Kentucky Practical Probate, Professional Education Systems (1988)

“Estate Administration and Drafting to Avoid Probate and Administration Problems” Kentucky Practical Probate, Professional Education Systems (1987)

Other Speeches and Presentations

Speeches and presentations annually to civic and charitable groups including Rotary Clubs, investment groups, boards of directors of nonprofit and charitable organizations, church groups, and other similar organizations. Topics include: Asset protection for physicians and others, Business Succession Planning, Tax Planning, Estate Planning.