

## **Probate, Trusts and Estate Planning**

Friday, September 16, 2005  
Main Lounge, Iowa Memorial Union  
University of Iowa, Iowa City, IA

**8:00 Registration**

**8:30 Estate Tax Planning in the Eye of the Tax Reform Storm: Which Way to Run?**

Paul Morf [Simmons, Perrine, Albright and Ellwood, Cedar Rapids, IA]

**9:30 Refreshment Break**

**9:45 Succession Planning** - Gary J. Streit [Shuttleworth & Ingersoll, P.L.C., Cedar Rapids, IA]

**10:45 Charitable Gift Planning** - Thomas H. Gelman [Phelan, Tucker, Mullen, Walker, Tucker & Gelman, Iowa City, IA]

**11:45 Complimentary Lunch**

**12:30 2005 Iowa Probate and Trust Law Changes**

Sue Pence [Iowa State Bank & Trust Co., Iowa City, IA]

**1:30 Qualified Plan Distributions After Death**

David Dettman [Lane & Waterman, Davenport, IA]

**2:30 Refreshment Break**

**2:45 Ethical Issues in Estate Planning, Probate & Trust Practice** [Panel Discussion]

Moderator Robert Downer [Meardon, Sueppel & Downer P.L.C., Iowa City, IA]

**3:45 Adjourn**

## General Information

**Meetings:** The Probate, Trusts & Estate Planning CLE program on Friday, September 16, 2005, will be held in the Main Lounge of the Iowa Memorial Union, on the University of Iowa Campus, in Iowa City. The registration fee for this program is \$170.00 each. In order to guarantee that you will have materials, it is necessary to preregister. You can go to [www.law.uiowa.edu/cle/register.php](http://www.law.uiowa.edu/cle/register.php) to register for any of the Fall 2005 CLE programs. You will still need to print out the registration form and return it in the mail with your payment. If you wish to pay with a credit card, there is a \$1.00 processing fee.

**Housing:** A limited number of hotel rooms have been reserved for these conferences at the Iowa House in the Iowa Memorial Union. You will pay the Iowa House directly. The Iowa House has a one-month release date so housing arrangements should be made as soon as possible. You can call the Iowa House directly to check on your reservation or to confirm late arrival at 319-335-3513. Please note that you are limited in reserving one (1) room per night for each program.

**Parking:** There is a parking ramp directly east of the Iowa Memorial Union, and parking is available on Saturdays in the parking lot directly south of the College of Law. Go to [www.uiowa.edu/~maps](http://www.uiowa.edu/~maps) for maps of the campus, building locator, and parking

**Mandatory Continuing Legal Education:** The Probate, Trusts & Estate Planning CLE program is an accredited program under the regulations of the Iowa Supreme Court Commission on Continuing Legal Education. This program will provide a maximum of 6 hours of regular credit toward the mandatory continuing legal education requirements under the Iowa Rules, 1 hour of ethics credit, and 2 hours of federal CLE credit.

**Football Tickets:** Since there is such a high demand for Iowa Hawkeye football tickets, there is a purchase limit of two (2) tickets per registrant for each football game. The price of the tickets include a \$2.00 handling fee per ticket. Due to limited availability, ticket requests will be filled on a “first-come, first-served” basis while tickets last.

**Cancellation Policy:** A full refund will be given if registration is canceled 48 hours prior to the conference. No refunds will be made after 8:00 a.m. on the Wednesday prior to the program. Course materials will be sent to those registrants canceling after the refund deadline.