

Sessions

National speakers will present on cutting edge tax and estate planning issues. The day also features business-focused seminars addressing tax and legal issues faced in the life cycle of a business.

Schedule

- 7:30 a.m. Registration Opens**
Networking Breakfast
- 8:35 a.m. Plenary Session: Avoiding the Adverse Effect of Chapter 14 for Closely Held Business Interests**
N. Todd Angkatavanich, Withers Bergman LLP, Greenwich
Jonathan Blattmachr, Pioneer Wealth Partners LLC, New York, NY
Louis A. Mezzullo, Withers Bergman LLP, Rancho Santa Fe, CA
- 10:15 a.m. Break**
- 10:35 a.m. Concurrent Session A: Recent Significant Connecticut Probate Court Decisions**
Estate Planning Session
Brad Gallant, Day Pitney LLP, New Haven
Rebecca A. Iannantuoni, Day Pitney LLP, New Haven
- Concurrent Session B: Tax issues in Forming a Business Entity**
Business Session
Richard G. Convicer, Convicer & Percy LLP, Glastonbury
Louis A. Mezzullo, Withers Bergman LLP, Rancho Santa Fe, CA
- 11:30 a.m. Concurrent Session A: Managing Cyber-Risks: Are You, Your Firm, and Your Clients Cyber-safe?**
Estate Planning Session
Scott Brown, Stroz Friedberg, Boston, MA
Suzanne Brown Walsh, Cummings & Lockwood LLC, West Hartford
- Concurrent Session B: Tax Aspects of Buying and Selling a Business—Selected Issues**
Business Session
Morris W. Banks, Pullman & Comley LLC, Hartford
Diana S.C. Zeydel, Greenberg Traurig LLP, Miami, FL
- 12:20-1:10 p.m. Luncheon**
- 1:10 p.m. Plenary Session: Washington, DC Update**
Ronald D. Aucutt, McGuireWoods LLP, Tysons Corner, VA
- 2:05 p.m. Concurrent Session A: Income and Estate Tax Planning for the Sensibly Aggressive**
Estate Planning Session
Steven M. Fast, Day Pitney LLP, West Hartford
Laura Schuyler, Day Pitney LLP, West Hartford
- Concurrent Session B: What's Hot in Life Insurance?**
Business Session
Lawrence Brody, Bryan Cave LLP, St. Louis, MO
Gary L. Flotron, G. L. Flotron & Associates, St. Louis, MO
- 2:55 p.m. Break**
- 3:20 p.m. Plenary Session: Asset Protection Using Traditional Estate Planning Techniques**
Duncan E. Osborne, Osborne Helman Knebel & Deleery LLP, Austin, TX
- 4:10 p.m. Closing Remarks**
- 4:30 p.m. Evening Reception**

CLE Credit: 6.5 Hours

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Standard Registration (for registrations received between October 1 and October 19)

- Member: \$249
- Non-member: \$324
- Law and Paralegal Student Member: \$149

Late Registration (for registrations received after October 19)

- Member: \$319
- Non-member: \$439
- Law and Paralegal Student Member: \$169

Please choose your sessions:

10:35 a.m. – 11:25 a.m.

- Estate Planning Session: Recent Significant Connecticut Probate Court Decisions
- Business Session: Tax issues in Forming a Business Entity

11:30 a.m. – 12:20 p.m.

- Estate Planning Session: Managing Cyber-Risks: Are You, Your Firm, and Your Clients Cyber-safe?
- Business Session: Tax Aspects of Buying and Selling a Business—Selected Issues

2:05 p.m. – 2:55 p.m.

- Estate Planning Session: Income and Estate Tax Planning for the Sensibly Aggressive
- Business Session: What's Hot in Life Insurance?

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Except in compelling circumstances, refunds will not be granted for cancellations received later than September 18.

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