



34th Annual EBA Estate and Business Planning Institute

Friday, November 10, 2023
DoubleTree Downtown, Evansville

IN: 6 CLE; 1 Ethics; 1 CME available
KY: 6 CLE, 1 Ethics
Indiana CPAs: 7.2 CE
Indiana Insurance Professionals: 6 CE
CFP Board for 6 CE credit

Agenda

8:00 a.m.	Ballroom A	Registration and Breakfast
8:25 a.m.		Introductions
8:30 a.m.	Ballroom A	Recent Developments and Case Law Updates – Jeff Kolb, Kolb Roellgen & Taylor LLP
9:35 a.m.	Ballroom A	Business Transition – Kate Beatty, Fifth Third
10:35 a.m.		Break
10:50 a.m.		Workshop Session I:
	Crescent Room	A. GST: Generation-Skipping Transfer – Stephen Schnelker, KSM
	Ballroom D	B. Life Insurance and Disability: Creative Uses in Estate Planning – Gary McCall, German American
	Ballroom C	C. Probate and Trust Mediation and Litigation (CME) – Jim Casey, Ziemer Stayman Weitzel & Shoulders
11:50 a.m.	Ballroom B	Lunch
12:30 p.m.		Workshop Session II:
	Crescent Room	A. GST: Generation-Skipping Transfer – Stephen Schnelker, KSM
	Ballroom D	B. Life Insurance and Disability: Creative Uses in Estate Planning – Gary McCall, German American
	Ballroom C	C. Probate and Trust Mediation and Litigation (CME) – Jim Casey, Ziemer Stayman Weitzel & Shoulders
1:30 p.m.		Break
1:40 p.m.	Ballroom A	Updated and Pending Tax Regulations in Estate and Business Planning – Jeff Dible, Frost Brown Todd
2:40 p.m.		Break
2:50 p.m.	Ballroom A	If You See Something, Say Something (Ethics) – Magistrate Andrew Bloch, Hamilton Superior Court
3:50 p.m.		Adjourn

