32nd Annual
EBA Estate & Business Planning Institute
Friday, November 5, 2021
DoubleTree in Downtown Evansville and Live Webcast

IN and KY Attorneys: 6 CLE/1 Ethics
Indiana CPAs: 7.2 (50-minute hours)
Indiana Insurance Professionals: 6 CE (Includes 1 Ethics)
Accepted by the CFP Board for 6 hours CE credit

8:00 a.m.	Check-in at DoubleTree or Webcast opens to attendees
8:25 a.m.	Welcome and Introductions – Joshua Trockman, KDDK, Seminar Chair
8:30 a.m.	***Recent Indiana Legislative and Caselaw Updates: Estates, Trusts, Guardianships, Advanced Directives and More*** – Todd Glass, Fine & Hatfield
9:30 a.m.	***Charitable Giving Strategies to Help Your Clients Achieve Their Philanthropic Goals*** – R. Jonathan Raymon, Baird Trust Company and Chris Staples, Baird Trust Company
10:30 a.m.	Break
10:45 a.m.	***Saving Your ASS(ETS) – Common Asset Protection Planning Errors and Medicaid Application Mistakes*** – Randall K. Craig, Law Offices of Randall K. Craig
11:45am	LUNCH
12:30pm	***Recent Changes In Estate Tax*** – Mark Samila, Kahn Dees Donovan & Kahn
1:30 p.m.	Break
1:45pm	***Estate and Trust Updates including Estate 706 and 1041 Preparation Tips, Tricks and Pitfalls*** – Amy Tenbarge and John Perkins, Kemper CPA Group
2:45 p.m.	***Ethical Issues When Representing Fiduciaries*** – Dr. Roberta Flowers, Stetson University College of Law
3:50 p.m.	Adjourn