### DIGITAL RECORDINGS

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**Forty-Ninth Annual Notre Dame® Tax and Estate Planning Institute**

**Century Center – South Bend, Indiana – September 20th – 22nd, 2023**

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**Wednesday September 20th, 2023**

**\_\_\_ Session 1**: Trust Basis and Promissory Notes In Life and At Death for Grantor Trusts*-* Mark Mullin and Stephanie Vara

**\_\_\_ Session 2:** Ethical Considerations When Representing Vulnerable Adults (**Ethics) -** Sandra Glazier

**Thursday September 21st, 2023**

**Track A Sessions**

**\_\_\_ Session 3:** Current Developments Of Importance To Estate Planners - Turney Berry and Charles “Clary” Redd 1st hour

**\_\_\_ Session 4:** Current Developments Of Importance To Estate Planners **-** Turney Berry and Charles “Clary” Redd 2ndhour

**\_\_\_ Session 5:** Drafting SLATs, GRATs, IDGTs and Other Irrevocable Trusts - Diana Zeydel

**\_\_\_ Session 6:** Practical navigation of estate and gift tax audits post COVID:

The World has Changed, and so has the Audit Mindset. - Louis Harrison

# \_\_\_ Session 7: Charitable Planning Using Non-Charitable Trusts - Kim Kamin

**\_\_\_ Session 8:** Winning At The Section 2702 Table When Playing Against the IRS - Jonathan Blattmachr

**\_\_\_ Session 9:** Defining Descendants: Adoption, Stepchildren, Nonmarital Children, Foster Children, Posthumous

Descendants and Assisted Reproductive Technology - T&E Panel: Susan Lipp, Kim Kamin, Marty Shenkman, Sandra Glazier

**Track B Sessions**

**\_\_\_ Session 10:** Tax and Non-Tax Planning for Passing on the Closely Held Business - Chris Jones

**\_\_\_ Session 11:** Powerful Trust Laws to Combat Future Uncertainties: The Need for Flexibility – Al King

**\_\_\_ Session 12:** Yes Virginia, Trustees Do Have a Duty To Minimize State Income Taxes on Trusts - Richard Nenno & Vincent Thomas

**\_\_\_ Session 13:** Valuation of Life Insurance Policies For Estate Planning, Life Settlements and Transfers to Entities:

Perceived Valuation Myths - Todd Steinberg and Jamie Mendelsohn

**\_\_\_ Session 14:** The Corporate Transparency Act: What Every Estate Planner Needs To Know - Raj Malviya

**Friday September 22nd, 2023**

**Track A Sessions**

**\_\_\_Session 15:** Flexibility and Planning Opportunities With Estate Planning In Mind: Using Check The Box Elections - Larry Brant

**\_\_\_Session 16:** Love, Marriage, Dissolution and Estate Planning: The interplay between matrimonial

law and taxation - Sean Weissbart and Kyle Durante

**\_\_\_ Session 17:** “La Commedia e' Finita!” Ending The Attorney Client Relationship Without Tears **(Ethics)** - Bruce Ross

**\_\_\_ Session 18**: Death Administration of Retirement Accounts After SECURE 2.0 - Steven E. Trytten

**\_\_\_ Session 19:** Strategies That Work Better With Higher Interest Rates - David Handler

**\_\_\_ Session 20:** Using Installment Sales to Non-Grantor Trusts to Defer Reporting

the Gain from the Sale of Business Interests - Paul Lee

**\_\_\_ Session 21:** Notre Dame 2023: Review of Conference Presentations and Key Takeaways - Turney Berry & Charles “Clary” Redd

**Track B Sessions**

**\_\_\_ Session 22:** Planning For and With QTIPs - Carlyn McCaffrey

**\_\_\_ Session 23:** What Are The Limits To What I Can Do With Qualified Small Business Stock? - David Herzig, Chris Siegle

**\_\_\_ Session 24:** What Does it Mean to be a Trusted "Advisor," And How Does That Help Us To Have Careers that Are

Wholesome and Enriching? **(Ethics) -** Bruce Stone

**\_\_\_ Session 25:** Communicating Estate Planning Proposals Using Financial Modeling **(technology credit)** - Brad Dillon

**\_\_\_ Session 26:** Debt Refinancing for Encumbered Real Estate: Increasing the Income Tax Basis

Step-up After the Freeze Has Been Implemented. - Stephen Breitstone

**\_\_\_\_ Session 27:** Breaking Old Habits: Revisiting Tax Driven Restrictions when Naming a Trustee - Stephen Liss

**\_\_\_ Session 28:** Factors to Consider When Choosing the Jurisdiction for a Trust - Amy Kanyuk