

Annual Estate Planning Update 2018

Thursday May 17, 2018
7:45 a.m. – 4:00 p.m.

New Mexico State Bar Center
5121 Masthead, N.E.
Albuquerque, New Mexico 87109

To Register: Mail a check for \$75 to the Independent Community Foundation, Inc. We will not accept registrations by phone or email.

Seating is limited, so you must register to attend.

Professional Credit Pending: CLE CE, CFP, CPA and Insurance (including Ethics)

Note: CE Credits for CFPs may only be available for attendees who are present the entire day, per the CFP regulations.

Agenda

Sign-in		7:45 – 8:15 a.m.
Introductory Comments		8:15– 8:30 a.m.
Federal and State Estate and Gift Tax Update 2018	Vickie R. Wilcox, J.D., LL.M.	8:30 – 10:00 a.m.
Break		10:00 – 10:15 a.m.
Asset Protection in Estate Planning: Irrevocable Trusts, Super Creditors, and the Courts	Patricia Tucker, J.D.	10:15 – 11:15 a.m.
Guardianships and Conservatorships in New Mexico: What Now, What Next?	Gregory W. MacKenzie, J.D.	11:15 – 12:15 p.m.
Lunch: Pizza, Drinks, and Networking in the Charity Exhibit Hall		12:15 – 1:30 p.m.
Artists, Authors, Musicians and Scientists, Oh My! Estate Planning for Creators of Intellectual Property	Jeffrey D. Myers, M.S., J.D.	1:30 – 2:30 p.m.
What Documents Do I Take to the Hospital? Overview of Basic Health Care Documents	Vickie R. Wilcox, J.D., LL.M.	2:30 – 3:00 p.m.
Ethical Concerns When Representing the Elderly or Disabled in Estate Planning	William D. Slease, J.D.	3:00 – 4:00 p.m.

Presented By:

Wilcox & Myers, P.C.

Post Office Box 70238

Albuquerque, New Mexico 87197

Phone: (505) 554-1115

Fax: (505) 554-1121

www.wilcoxlawnm.com

To RSVP, please mail your \$75

registration fee and your contact

information to the address on the

left. We will not accept

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