

# WILCOX LAW FIRM, P.C.

“PROVIDING EXCEPTIONAL ESTATE PLANNING SERVICES FOR EXCEPTIONAL CLIENTS”®

## Annual Estate Planning Update 2016

Wednesday, May 4, 2016  
7:45 a.m. – 5:00 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 be accepting  
registration by phone or email this year.

Seating is limited, so you must register to attend.

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

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

### Agenda

<i>Sign-in</i>		7:45 – 8:15 a.m.
What's New in New Mexico? Overview of Statutory and Regulatory Changes and Judicial Decisions for New Mexico Estate Planners in 2016	Vickie R. Wilcox, J.D., LL.M.	8:30 – 9:00 a.m.
Uncovering New Opportunities in Estate Planning: Undoing Discounts, Revoking the Irrevocable, and Other Ideas for Income Tax Planning	Vickie R. Wilcox, J.D., LL.M.	9:00 – 10:00 a.m.
<i>Break</i>		10:00 – 10:15 a.m.
Estate Plans of Dead Celebrities: How the Intellectual Property of the Rich and Famous Was (Not) Handled – and How YOU (and therefore your Clients) Can Learn from Their Mistakes	Jeffrey D. Myers, J.D.	10:15 – 11:15 a.m.
Hot Topics: Litigation Risks in the Uniform Prudent Investor Act and Uniform Trust Code for Fiduciary Investment	Gregory W. MacKenzie, J.D.	11:15 – 12:15 p.m.
<i>Lunch: Pizza, Drinks, and Networking in the Charity Exhibit Hall</i>		12:15 – 1:15 p.m.
<b>Federal Gift and Estate Planning Update/Special Guest Speaker</b>	<b>Steve R. Akers, J.D.</b>	<b>1:15 – 2:45 p.m.</b>
Ethical Issues and Risks for Attorneys, CPAs, and Financial Advisors under HIPAA (YES! It Does Apply to You)	Madison R. Jones, M.B.A. Vickie R. Wilcox, J.D. LL.M.	2:45 – 3:45 p.m.
<i>Break</i>		3:45 – 4:00 p.m.
Buy Sell Agreements/Insurance Overview for Estate Planners and Family Advisors	James J. Widland, J.D.	4:00 – 5:00 p.m.

#### Presented By:

ICFI

c/o Wilcox Law Firm, 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.  
This year, we will not accept  
registration by email or phone.