

WILCOX LAW FIRM, P.C.

“PROVIDING EXCEPTIONAL ESTATE PLANNING SERVICES FOR EXCEPTIONAL CLIENTS”®

Annual Estate Planning Update 2017

Thursday May 18, 2017
7:45 a.m. – 4:45 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
registrations by phone or email.

Seating is limited, so you must register to attend.

Professional Credit Approved: 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 2017	Vickie R. Wilcox, J.D., LL.M.	8:30 – 9:45 a.m.
What Fiduciaries, Estate Planners, and Other Advisors Should Know About Oil and Gas Interests	Sealy Cavin, Jr., J.D., LL.M. Scott S. Morgan, J.D.	9:45 – 10:45 a.m.
Break		10:45 – 11:00 a.m.
State of the State from the Judiciary’s Perspective	Chief Judge Nan Nash, J.D.	11:00 – 12:00 p.m.
Lunch: Pizza, Drinks, and Networking in the Charity Exhibit Hall		12:00 – 1:30 p.m.
Advising the Small Business Owner on Insurance Coverage: From Property to D & O (and in Between)	Betsy Carlson, RPLU, ASIL, CIC Vickie R. Wilcox, J.D., LL.M.	1:30 – 2:30 p.m.
Advising the Small Business Owner on Intellectual Property: From Trademarks to Non-Competes (and in Between)	Jeffrey D. Myers, J.D.	2:30 – 3:30 p.m.
Break		3:30 – 3:45 p.m.
A Gaze Into the Crystal Ball: The Future of Estate Planning Services and the Ethical Issues Raised	William D. Slease, J.D.	3:45 – 4:45 p.m.

Presented By:

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To RSVP, please mail your \$75
registration fee and your contact
information to the address on the
left. We will not accept
registration by email or phone.