CFP BOARD

54th Annual Heckerling Institute on Estate Planning ~ January 13 – 17, 2020
Session Breakdown

Day / Time	Session Title	CE Hours Granted
Monday 9:00 – 12:15	**Fundamentals Program** The Life-Changing Magic of Grantor Trusts	3.50
2:00 –2:10 2:10 – 5:15	Introductory Remarks Recent Developments 2019	3.00
Tuesday 9:00 – 9:50	Peripatetic Clients: No, It's Not an Illness but They Need Your Constant Care	1.00
9:50 – 10:40	You Mean I Can't Bribe the Coach? Modern Ethics Issues You Didn't See Coming	1.00
10:55 – 11:45	Don't Talk to *Strangiers*: Defensive Planning in an Era of *Powell* Paranoia	1.00
11:45 – 12:35	The Future of Financial Warfare in an Era of Great Power Competition	1.00
2:00 – 2:50	What Makes a Special Needs Trust So Special, and When Should One Be Used?	1.00
2:50 – 3:40	It's a Small World After All: Representing Global Families During Times of Unprecedented Change	1.00
3:55 – 4:45	Why Do I Cringe Every Time I See an S Corporation in My Client's Estate Plan?	1.00
4:45 – 5:35	From Here to Eternity: Designing Trusts for the Long Haul	1.00
Wednesday 9:00 – 9:50	Full Disclosure: It's a Matter of Trust	1.00
9:50 – 10:40	Beyond the Binary: Choosing Between Grantor and Non-Grantor Status	1.00
10:55 – 12:35	Question and Answer Panel	0
2:00 – 5:20	**Fundamentals Program** *(Runs Concurrently with Special Sessions I & II)* Fundamentals of Life Insurance - What You Need to Know and What You Think You Know	3.50
2:00 – 3:30	**Special Sessions I**	
I-A	Creative Planning Techniques with Grantor and Non-Grantor Trusts	1.50
I-B	A Global Perspective on Representing Global Families During Times of Unprecedented Change	1.50
I-C	Special Needs Trusts: Recent Developments and Ethical Considerations	1.50
I-D	Benevolence vs. Bloodline: Creative Solutions Involving Charitable Lead Trusts and Charitable Remainder Trusts	1.50
I-E	Key Provisions and Clauses for Trusts That Will Stand the Test of Time (And War Stories of Many That Didn't)	1.50
I-F	Planning for Tangible Personal Property: Passing Down Your Prized Possessions	1.50

Day / Time	Session Title	CE Hours Granted
3:50 – 5:20	**Special Sessions II**	
II-A	Have You Successfully Crossed State Lines or Have You Lost Your Way?	1.50
II-B	The Fiduciary Drake Passage: Navigating to Avoid Common Trustee Liability Issues	1.50
II-C	Fire Cannot Kill A Dragon: Hot Topics in Privilege and Ethics Issues	1.50
II-D	Our Clients Are Living Longer but Their Marriages Are Not: The Intersection of Estate Planning and the Gray Divorce	1.50
II-E	Taking the S-tress out of S Corporations in Estate Planning	1.50
II-F	Opportunity Is Knocking: Frozen O-Zone Planning with Qualified Opportunity Funds	1.50
Thursday 9:00 – 9:50	A Sequel Much Worse Than the Original: Planning for GST Tax on Nonexempt Trusts	1.00
9:50 – 10:40	What If Granny Wants to Gamble? Balancing Vulnerability and Autonomy in the Golden Years	1.00
10:55 – 11:45	What to Do When the Family Foundation Isn't Working: Practical and Tax Consequences of Terminations, Divisions and Transfers	1.00
11:45 – 12:35	Back to the Future: The Central Role of Family Governance in Today's Estate Planning	1.00
2:00 – 3:30	**Fundamentals Program** *(Runs Concurrently with Special Sessions III)* What You Don't Know Can Hurt You: Securities Law Issues for Estate Planners	1.50
2:00 – 3:30	**Special Sessions III**	
III-A	How Bad Can It Be? Planning and Defending LPs and LLCs with "Bad Facts"	1.50
III-B	Review of the Past Year's Significant, Curious, or Downright Fascinating Fiduciary Cases (at least it seems to me)	1.50
III-C	One is the Loneliest Inclusion Ratio: Advising Trustees and Beneficiaries of GST Tax Nonexempt Trusts	1.50
III-D	Around the World in 90 Minutes	1.50
III-E	Dissolution, Division, Distribution, or DAF: Options for the Obsolete Family Foundation	1.50
III-F	Don't Get Lost in Cyberspace: How to Plan for and Administer Digital Assets	1.50
3:50 – 5:20	**Special Sessions IV**	
IV-A	Can You Roll Over in Your Grave? What Executors, Trustees, and Beneficiaries Must Know About Inherited Retirement Benefits	1.50
IV-B	Selected Income Tax Issues Affecting Estate Planning	1.50
IV-C	Corporate Fiduciaries: The Inside View	1.50
IV-D	Cures for a Cosmopolitan Hangover: What We're Doing for International Clients Following Tax Reform	1.50
IV-E	A Family Office Member, a Therapist and an Estate Planning Attorney Walked into a Bar...Here's What They Said	1.50
Friday 9:00 – 9:50	Doing Well by Doing Good: How Charitable Giving with Retirement Benefits Can Help Your Charitable and Human Beneficiaries	1.00
9:50 – 10:40	You Call It a Practice, I Call It a *Business*	0
10:50 – 12:00	Finishing Strong	1.00
Total Available Credit		**29.00**