The RED SHIELD Symposium

(formerly the Estate & Charitable Gift Planning Institute)

www.TheRedShield.org

October 16, 2018 | 8:00 a.m. – 4:00 p.m. (CDT)

Presented by Charles A. Redd

Doors Open & Registration | 8:00 a.m. – 8:45 a.m.

Opening Remarks | 8:45 a.m. – 8:59 a.m.

Estate Planning in 2018 | 9:00 a.m. – 10:30 a.m.

- > 2017 tax law
- > Status of basis consistency proposed regulations
- > IRC Section 642(c) development
- > Portability
- > Grantor trusts — substitution of assets
- > Decanting
- > Changing trust situs

Break | 10:30 a.m. – 10:45 a.m.

When Actions Speak Louder Than Words | 10:45 a.m. – 11:45 a.m.

- > Charitable remainder trust disqualified
- > Decanting declared void
- > Grantor trust inadvertently created
- > Charitable deduction squandered

Questions & Answers | 11:45 a.m. – 12:15 p.m.

Lunch | 12:15 p.m. – 1:30 p.m.

The Salvation Army in Your Community | 1:00 p.m. – 1:30 p.m.

Updates from your local Salvation Army on how Planned Gifts truly make a difference.

Designing & Administering Trust Distribution Mechanisms
1:30 p.m. – 2:30 p.m.

- > Benchmarks for distributions
- > Absolute discretion
- > Ascertainable or objective standards
- > Proper drafting of discretionary distribution language
- > Trustee as beneficiary
- > Loans to beneficiaries

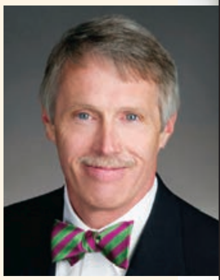
Break | 2:30 p.m. – 2:45 p.m.

Ethics Issues Facing Trusts & Estates Practitioners
2:45 p.m. – 3:45 p.m.

- > Screening clients to avoid problems before they develop
- > Ethics dilemmas in asset protection planning
- > Representing clients with diminished capacity
- > Obligations of lawyer after representation has become dormant

Questions & Answers | 3:45 p.m. – 4:00 p.m.

CLARY REDD



Charles A. ("Clary") Redd is a partner in the St. Louis, Missouri, office of the law firm of Stinson Leonard Street LLP. Mr. Redd concentrates his practice in estate planning, estate and trust administration, and estate and trust-related litigation.

Mr. Redd has extensive experience and expertise in: (a) the drafting of wills, trust instruments, durable powers of attorney, marital agreements and other estate planning documents; (b) pre- and post-death tax planning for individuals, trusts and estates; (c) preparation and filing of estate tax returns, gift tax returns and fiduciary income tax returns; (d) representation and filing of estate tax returns, gift tax returns and fiduciary income tax returns; (e) representation of individual and corporate fiduciaries and (f) litigation in the Probate Division and other equity divisions of the Circuit Court. Mr. Redd has worked on estates and estate planning projects, some involving assets valued at over a billion dollars, and has successfully handled numerous estate tax, gift tax and generation-skipping transfer tax matters, will and trust construction cases, will contests, contests of trust agreements, alleged breach of fiduciary duty cases and other types of cases involving estates and trusts.

Mr. Redd is a member of The Missouri Bar (Probate and Trust Committee), the Illinois State Bar Association (Section on Trusts and Estates) and the State Bar of Wisconsin (inactive). In addition, Mr. Redd is an elected member of The American Law Institute, a Fellow of The American College of Trust and Estate Counsel (Past Missouri State Chair; Past Regent; Communications Committee (Past Chair); Estate and Gift Tax Committee; and Fiduciary Litigation Committee) and for 15 years was an Adjunct Professor of Law (Estate Planning) at Northwestern University School of Law. He also serves as Co-Chair of the Editorial Advisory Board of, and writes a regular column in, *Trusts & Estates* magazine. Mr. Redd is listed in *The Best Lawyers in America* and is nationally ranked by Chambers USA in its "Wealth Management" category. He frequently writes and lectures nationally on topics in the trusts and estates field.

CONTINUING EDUCATION CREDIT INFORMATION

CLE, CPE, CFP® and CTFA continuing education credits are pending approval, including one hour of ethics for CLE, CPE and CTFA. Credit hours vary from state to state.
Please contact Amy at amyjsavage@yahoo.com for your state accreditation.

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