

Wilcox & Myers, P.C.

"Providing Exceptional Estate Planning Services for Exceptional Clients"®

ANNUAL ESTATE PLANNING UPDATE 2023

THURSDAY MAY 18, 2023

7:45 A.M. – 4:00 P.M.

AGENDA

SIGN IN	7:45 – 8:15 A.M.
INTRODUCTORY REMARKS	8:15 – 8:30 A.M.
FEDERAL AND STATE ESTATE AND GIFT TAX UPDATE 2023 VICKIE R. WILCOX, J.D., LL.M.	8:30 – 9:15 A.M.
CORPORATE TRANSPARENCY ACT AND SECURE ACT 2.0 VICKIE R. WILCOX, J.D., LL.M.	9:15 – 10:00 A.M.
NON-COMPETE V. NON-SOLICITATION: THE FTC'S PROPOSED PROHIBITION AND THE STATES' POSITIONS JEFFREY D. MYERS, M.S., J.D.	10:00 – 10:30 A.M.
BREAK	10:30 – 10:45 A.M.
CONTINUING EDUCATION SMORGASBORD: OVERVIEW OF CURRENT HOT TOPICS MADISON R. JONES, J.D., M.B.A.	10:45 – 11:45 A.M.
LUNCH: PIZZA, BEVERAGES, AND NETWORKING IN THE CHARITY EXHIBIT HALL	11:45 – 12:45 P.M.
INTERACTING WITH HOSPITALS & STAFF, FAMILIES & INSURANCE COMPANIES REGARDING ADVANCED DIRECTIVES & END OF LIFE DECISIONS CHRISTY CALDERWOOD, J.D.	12:45 – 1:45 P.M.
SPEAKING WITH ALL THE LETTERS: HAVING PRODUCTIVE CONVERSATIONS WITH CLIENTS ABOUT LGBTQ+ EP ISSUES (IN FINANCIAL, LEGAL, AND INSURANCE SERVICES) DEIAN MCBRYDE, J.D.	1:45 – 2:45 P.M.
BREAK	2:45 – 3:00 P.M.
ETHICS: JUDGING CAPACITY, UNDUE INFLUENCE, ENGAGEMENT AGREEMENTS, AND CONFLICT WAIVERS: BEST PRACTICES ANNE TAYLOR, J.D.	3:00 – 4:00 P.M.