



## Schedule of the Day – Sunday

<b>Sunday, November 3</b>		<b>WEALTH TRANSFER PLANNING</b>	
<b>Times</b>	<b>Program Titles</b>	<b>Speakers</b>	<b>Locations</b>
11:00 – 12:00	Early Registration		Foyer
12:00 – 5:00	Fiduciary Income and Wealth Transfer Taxation Workshop	Stephan King David K. Walser	Honolulu Room
12:00 – 5:00	Estate and Gift Tax after the Tax Cuts and Jobs Act	Scott DeFreest Andrew S. Katzenberg Sean R. Weissbart	Oahu Room



# Schedule of the Day – Monday

Monday, November 4 <span style="float: right;"><b>WEALTH TRANSFER PLANNING</b></span>			
Times	Program Titles	Speakers	Locations
6:00	Registration & Continental Breakfast		Foyer
6:30 - 8:00 <b>CPE/Legal Ethics</b>	Everything You Wanted To Know about Fiduciary Accounting but Were Afraid To Ask, Including Ethical Considerations	Arnold H. Gold, Judge Retired Francine R.S. Lee	Lanai Ballroom
8:00 - 8:15	Official Welcome and Opening Ceremony	Chaminade University Dr. Lynn Babington, President	Maui Ballroom
8:15 - 9:45	Recent Developments Facing All Wealth Transfer Advisors and Current Transfer Tax Changes under the Trump Tax Cuts and Jobs Act	Thomas Barthold Turney P. Berry Charles "Clary" A. Redd	Maui Ballroom
9:45 - 10:00	Break		Foyer
10:00 - 11:00	Not Your Parents' Estate Plan: Planning Considerations for Next Gen Clients	John F. Bergner Matthew E. Brady Rhonda L. Griswold	Maui Ballroom
11:00 - 12:00 <b>CPE/Legal Ethics</b>	Caution Trustees – Beware of Unresolved Tax Liabilities of Incapacitated Taxpayers and Decedents; Ethical Considerations	Caroline D. Ciraolo Judge David J. Cowan Chief Justice Maurice Foley Kurt K. Kawafuchi	Maui Ballroom
12:00 - 1:30	LUNCHEON: The Role and Importance of the Joint Committee on Taxation to Our Nation's System of Taxation	Thomas Barthold	Kauai Ballroom
1:30 - 2:30	Current Developments and Trends under the Trump Tax Cuts and Jobs Act Affecting Nonprofits and Foundations	Ofer Lion Katharine Lloyd Marcus S. Owens	Maui Ballroom
2:30 - 3:30	Top Tax and Wealth Transfer Strategies after "Tax Reform" (Sorting through the COVFEFE)	Paul S. Lee	Maui Ballroom
<b>3:30 - 4:00</b>	<b>Aloha Ice Cream Social</b>		Foyer
4:00 - 5:00 <b>CPE/Legal Ethics</b>	<i>From the Inside Out:</i> Psychological, Ethical and Legal Aspects of Elderhood	Eileen Gallo-Ross Bruce S. Ross	Maui Ballroom



# Schedule of the Day – Tuesday Morning

<b>TUESDAY, November 5</b>		<b>WEALTH TRANSFER PLANNING</b>	
<b>Times</b>	<b>Program Titles</b>	<b>Speakers</b>	<b>Locations</b>
7:00 – 8:00	Continental Breakfast		Foyer
8:00 – 9:15	The 10 Commandments of International Tax and Wealth Transfer Planning	Bryan D. Kirk Alvina H. Lo Susan von Herrmann	Maui Ballroom
9:15 – 10:45	A Foreign Perspective – Income Taxation and Wealth Transfer Systems in Asia	Su-Mei Ban Lian Fang Joseph A. Field Robyn Meredith Kazuhiko Nishihara Michael Quigley	Maui Ballroom
10:45 – 11:00	Break		Foyer
11:00 – 12:00	A Tale of Two Taxpayers – Discount and Premium Valuations, Reporting and Defending, and Other Current Developments with the Tax Court	Chief Justice Maurice Foley Carsten Hoffmann Judy Y. Lee	Maui Ballroom
12:00 – 1:30	LUNCHEON: Tariff Trade Wars and the Global Economies – What Does It All Mean and Where Do We Go from Here?	Richard R. Vuylsteke	Kauai Ballroom



# Schedule of the Day – Tuesday Afternoon

<b>TRACKS 1:30 – 2:30</b>			
CHARITABLE	Charities Texting and Tweeting: Structuring for Social Movements – What Can Go Wrong?	Diara M. Holmes Robyn Mohr	Honolulu Room
COMPLIANCE	Planning/Pitfalls with SLATs	Domingo P. Such, III Laura A. Zwicker	Waianae Room
CONTROVERSIES	Taxation of Trust and Estates Settlements-Estate, Gift, GST, Income Tax, and Other Issues	Robin Klomprens Amy Takahashi	Kona Room
FIDUCIARY	The Virtual Private Trust Company and the Family Office	Richard A. Johnson Jonathan C. Lurie	Oahu Room
FINANCIAL	Preparing Your Clients' Closely Held Business for Sale or for the Next Generation	Daniel Fan David J. Iannini Michael Yi	Hilo Room
GLOBAL	Understanding Income Taxation and Wealth Transfer Taxation in Japan/South Korea	Kazuhiko Nishihara Michael Quigley	Puna Room
TAX	IRC Section 1446: It's All about Withholding, Disclosing, and Remitting the Tax	Robert N. Duran	Lanai Ballroom
<b>TRACKS 2:30 – 3:30</b>			
CHARITABLE	Evolution of the Role of Community Foundations	Micah Kane Tony Mestres	Honolulu Room
COMPLIANCE <b>CPE/Legal Ethics</b>	Protecting Client Data: Ethics, Security, and Practicality for All Wealth Transfer Advisors	Margaret Van Houten	Waianae Room
CONTROVERSIES	The Indicia of Financial Elder Abuse	Stewart R. Alberston Patrick M. Conley Keith A. Davidson Linda Saunders	Kona Room
FIDUCIARY <b>CPE/Legal Ethics</b>	Upstream Planning for Unused Exclusions and Ethical Considerations	Turney P. Berry Thomas J. Pauloski	Oahu Room
FINANCIAL	Using the Tools from Our Daily Toolbox for Asset Protection Objectives	David J. Beeton Robert K. Kirkland Katarinna McBride	Hilo Room
GLOBAL	Understanding Income Taxation and Wealth Transfer Taxation in Hong Kong/Singapore/Peoples Republic of China	Su-Mei Ban Lian Fang Robyn Meredith	Puna Room
TAX	Separating from Your Pass-Through Partners and Deferring the Capital Gain Using IRC Section 1031 and More	Tom Donahue Jeffrey A. Mannisto	Lanai Ballroom
<b>3:30 – 4:00</b>	<b>Ohana Tea and Cookies</b>		Foyer
<b>TRACKS 4:00 – 5:00</b>			
CHARITABLE	Comparing Different Charitable Vehicles	Carly E. Doshi Brian K. Janowsky Andrew S. Katzenberg	Honolulu Room
COMPLIANCE	Benefits of Tennessee Trust Laws	Richard A. Johnson Amy M. Peterson	Waianae Room
CONTROVERSIES	Trusts and Divorce	Sean R. Weissbart	Kona Room

FIDUCIARY	Optimizing Lifetime Gifting: Advising Clients in Uncertain Times	John F. Bergner Stephanie B. Casteel	Oahu Room
FINANCIAL	Earth Wind and Fire: Safeguarding Art, Antiques, and Jewelry	Blake Koh Maggie Reynolds Robert Suiter	Hilo Room
GLOBAL	Domesticating the Foreign Estate Plan and Translating It into American English	Jonathan C. Lurie Tabetha M. Peavey	Puna Room
TAX	IRS Voluntary Disclosure Program and Updates on the Other Offshore Procedures	Caroline D. Ciralo Kenneth J. Hines Victor Song	Lanai Ballroom



# Schedule of the Day – Wednesday Morning

<b>WEDNESDAY, November 6</b>		<b>WEALTH TRANSFER PLANNING</b>	
<b>Times</b>	<b>Program Titles</b>	<b>Speakers</b>	<b>Locations</b>
7:00 – 8:00	Continental Breakfast		Foyer
8:00 – 9:30	Current Developments and Trends in Retirement Accounts, IRAs, and Other Qualified Plans	Michael J. Jones Steven Trytten	Maui Ballroom
9:30 - 10:30 <b>CPE/Legal Ethics</b>	The Death of Jeffrey Epstein Raises Many Medical, Legal, and Ethical Wealth Transfer Considerations	Judge David J. Cowan Reva G. Goetz, Judge Retired Vivian L. Thoreen David W. Trader	Maui Ballroom
10:30 – 10:45	Break		Foyer
10:45 - 12:00	The Tremendous Estate and Income Tax Advantages of Using Trusts in which the Beneficiary Is the Deemed Income Tax Owner	S. Stacy Eastland	Maui Ballroom
12:00 – 1:30	LUNCHEON: Purpose and Mission of Hawaii’s Highest Court in the Land; The Supreme Court	Chief Justice Mark E. Recktenwald	Kauai Ballroom



# Schedule of the Day – Wednesday Afternoon

<b>TRACKS 1:30 – 2:30</b>			
CHARITABLE	A Study of High Net Worth Philanthropy: What Does It all really Mean?	Joseph Bui Douglas Mancino Lisa Snyder	Honolulu Room
COMPLIANCE	The Use of S Corporations in Estate Planning	Olga Bogush Brian K. Janowsky	Waianae Room
CONTROVERSIES	The Planner vs. The Enforcer: Issues which Cause Audits of Estate and Gift Tax Returns	Keith Schiller Lee C. Schwemer	Kona Room
FIDUCIARY	It Isn't over till the Post-Mortem Planning is Done	Robert K. Kirkland John T. Rogers, Jr.	Oahu Room
FINANCIAL	Managing Highly Appreciated Assets	William H. Atha, II	Hilo Room
INSURANCE	New Rules for Avoiding Traps that Could Make Life Insurance Subject to Income Tax	Steven B. Gorin	Puna Room
	Insurance Credit available CA and HI only		
TAX	Section 1202 Qualified Small Business Stock-Recent Developments	Michael E. Denzinger	Lanai Ballroom
<b>TRACKS 2:30 – 3:30</b>			
CHARITABLE	Impact Investing and ESG Integration	Susan Gary LaVerne Woods	Honolulu Room
COMPLIANCE	Powerful Trends and Advantages with Changing the Situs of a Trust Utilizing Modern Reformation/Modification, Restatement, and Decanting Strategies	Al W. King, III	Waianae Room
CONTROVERSIES	Powers of Attorney – Myths, Management, and Litigation	Stacie P. Nelson Vivian L. Thoreen	Kona Room
FIDUCIARY	Taking Care of Those in Need: All You Wanted To Know about Special Needs Trust Planning	Deborah J. Tedford Suzanne Brown Walsh	Oahu Room
FINANCIAL	Private Investor Advantage: 18 Strategies for Family Offices and Investors To Become More Effective	Richard C. Wilson	Hilo Room
INSURANCE	Accelerated Benefit Riders on Life Policies	Jason Koo	Puna Room
	Insurance Credit available CA and HI only		
TAX	Qualified Opportunity Zones Tax Benefits and Planning	Anne Gifford Ewing Steven R. Meier Greg Singer	Lanai Ballroom
<b>3:30 – 4:00</b>	<b>A Gathering – Wine and Cheese Sampling</b>		Foyer
<b>TRACKS 4:00 – 5:00</b>			
CHARITABLE	Crowdfunding for Charity: Federal Tax and State Charitable Solicitation Issues	Tania Ibanez David Levitt	Honolulu Room
COMPLIANCE	Does Your Wealth Transfer Strategy Create a Legacy	Arnold H. Gold, Judge Retired	

		Judy Y. Lee	Waianae Room
CONTROVERSIES	Family Dynamics, Ethical Considerations, and Intergenerational Conflict: Preserving Family Wealth and Harmony	Joline Godfrey Susan P. Rounds	Kona Room
<b>CPE/Legal Ethics</b>			
FIDUCIARY	Undoing the formerly Outstanding State Plan for Income Tax Planning	Keith Schiller	Oahu Room
FINANCIAL	Basics of Trust Administration Regarding Tangible Personal Property	Joseph J. Baratta Stephen Miyabe	Hilo Room
INSURANCE	Life Insurance for the Non-Resident Alien and/or Foreign National Client	Tony Yu	Puna Room
Insurance Credit available CA and HI only			
TAX	Searching for Basis in Estate Planning	Jonathan G. Blattmachr	Lanai Ballroom





# Schedule of the Day – Thursday

<b>THURSDAY, November 7</b>		<b>WEALTH TRANSFER PLANNING</b>	
<b>Times</b>	<b>Program Titles</b>	<b>Speakers</b>	<b>Locations</b>
7:00 – 8:00	Continental Breakfast		Foyer
8:00 - 9:00	A Washington D.C. Update - Current Income Tax Rules, Changes and Trends under the Trump Tax Cuts and Job Act	David H. Kirk	Maui Ballroom
9:00 - 10:00	Lessons Learned from the Past – Don’t Repeat the Same Mistakes of 2010	Andrew M. Katzenstein	Maui Ballroom
10:00 – 11:00	Planning for the Last Chapter: Elder Law Life Care Planning as a Multifaceted Approach with a Legal/Medical Team	Laurie T.S. Adamshick Kimberly Ong Thomas A. Rulon	Maui Ballroom
<b>11:00 – 11:30</b>	<b>Mahalo Puu Puus, Refreshments, and Desserts of Hawaii</b>		Foyer
11:30 - 12:30	Moving beyond Paper – How Technology (and Blockchain) Will Improve Wealth Transfer Security and Efficiency	Robert Barton J. Dax Hansen Christopher Sigmund	Maui Ballroom
12:30 - 1:30	Winning the jackpot – A Conversation with Your Clients They Will Always Remember!	Eleanor Johnson	Maui Ballroom