34TH ANNUAL RPTE NATIONAL CLE CONFERENCE

Virtual | In Person

April 26-29, 2022

DALLAS
34th Annual RPTE National CLE Conference
Virtual | In Person | April 26-29, 2022
Four Seasons Resort and Club | Dallas, Texas

rptecleconference.com

Welcome Message from RPTE Chair

I'm pleased and excited to announce the Section's Virtual 34th Annual RPTE National CLE Conference April 26-29, 2022. This year we will also provide an in-person option in Dallas to allow registrants the opportunity to reconnect with colleagues.

Our planning committee has developed an outstanding program focusing on the most trending areas of real property, trust, and estate law. Our faculty includes many of the leading practitioners in these areas who will update us on cutting-edge developments.

The Conference will allow registrants the opportunity to participate remotely both in real-time and later, on-demand. Please note, MCLE credit will only be available to those who watch programs in real-time.

For those who will be attending in-person, registrants will have the ability to watch all of the virtual programs together at the Four Seasons Resort and Club Las Colinas. This viewing option provides registrants the opportunity to enjoy the camaraderie and social networking.

I very much hope that you will choose to join us at the Virtual 34th Annual RPTE National CLE Conference.

Sincerely,

Robert C. Paul
Chair of the American Bar Association's
Section of Real Property, Trust & Estate Law

CHARLES P. RETTIG
U.S. Commissioner of Internal Revenue

CONFERENCE KEYNOTE SPEAKER

FRIDAY, APRIL 29 | 12:00 - 1:00 PM

* This program will be conducted with speakers presenting live from Dallas

Charles P. Rettig is the 49th U.S. Commissioner of Internal Revenue. As Commissioner, Mr. Rettig presides over the nation's tax system, which collects more than $3.5 trillion in tax revenue each year representing about 96% of the total gross receipts of the United States. In this regard, the continued success of our country depends upon a successful IRS since this revenue funds most government operations and public services. Mr. Rettig manages an agency of about 80,000 employees and a budget of more than than $11 billion.

34th Annual RPTE National CLE Conference Format

Virtual | In-person

The 34th Annual RPTE National CLE Conference will be presented virtually. Registrants will be granted online access to all CLE programs, session materials, MCLE certificates, access to our Conference exhibitors, and more! Registrants will have the opportunity to participate remotely both in real-time and later, on-demand.

We will also afford registrants the ability to watch all our virtual programs together, in-person, at the Four Seasons Resort and Club Las Colinas, in Dallas, Texas at the time of their broadcast. Anyone participating in this manner will be required to comply with all active local protocols and ABA policies regarding in-person meetings as they relate to COVID-19 prevention at the time of our meeting.

All sessions conducted as part of the 34th Annual RPTE National CLE Conference will be available for viewing virtually. Session panelists will deliver their remarks from remote locations. The final three sessions, which will be conducted on Friday, April 29, will be conducted with panels presenting live from Dallas. These sessions include the Plenary Luncheon featuring the 49th U.S. Commissioner of Internal Revenue and Joint Division Programs “Caring for Yourself While Caring for Others” and “Keeping Women in Practice.” These sessions will be broadcast live and registrants will have the option to either attend in-person or view them on our Conference website.

rptecleconference.com

SPONSORS

DALLAS

The Section acknowledges the generous support of the following sponsors for their involvement in this year's National CLE Conference:

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Time is scarce. Information is critical.

Groups

The Section of Real Property, Trust and Estate Law is unique in that we are comprised of three divisions, real property, trust and estate, and joint. These divisions are broken down into high-level groups, and further broken down into issue-specific committees. Group activity provides much of the basis for our high-quality educational programs like the ones produced for the National CLE Conference. View our list of Groups below and become involved in the Section's work.

To join a Group visit:
www.americanbar.org/my-aba/memberships/

JOINT GROUPS

- Joint Law Practice Management Group
- Joint Legal Education and Uniform Laws Group

REAL PROPERTY DIVISION

- Commercial Real Estate Transactions Group
- Hospitality, Timesharing, and Common Interests Development Group
- Land Use and Environmental Group
- Leasing Group
- Litigation and Ethics Group
- Real Estate Financing Group
- Residential, Multi-Family, and Special Use Group
- Special Investors and Investment Structure Group

TRUST AND ESTATE DIVISION

- Business Planning Group
- Charitable Planning and Organizations Group
- Elder Law and Special Needs Planning Group
- Employee Plans and Executive Compensation Group
- Income and Transfer Tax Planning Group
- Litigation, Ethics and Malpractice Group
- Non-Tax Estate Planning Considerations Group
- Trust and Estate Practice Group

REAL PROPERTY PROGRAMS AT-A-GLANCE

TUESDAY, APRIL 26

1:00 - 2:00 PM	Loan Basics: Recourse Guarantees	SALT Cap Workaround: Planning Opportunities and Traps to Avoid
2:00 - 2:30 PM	Break	
2:30 - 3:45 PM	End of the Road: Key Considerations in Ground Lease Surrenders	Navigating Defaulted CMBS Loans from the Borrower's and the Special Servicer's Perspectives

All times are Central Standard time

REAL PROPERTY PROGRAMS AT-A-GLANCE

WEDNESDAY, APRIL 27

All times are Central Standard time

10:00 - 11:00 AM	Playing Chess: How to Best Position Your Landowner/ Developer Client for Potential Litigation of Land Use/Permitting Applications	The Not-So Standard, Not-So Retail Shopping Center
11:00 - 11:30 AM	Break	
11:30 AM - 12:30 PM	Emerging Sustainability Issues In Real Estate Transactions	Don't be Casual about Casualty Provisions
12: 30 - 1:00 PM	Break	
1:00 - 2:00 PM	Let Your Light Shine Even When the Wind Blows: Wind and Solar Leases	Redacting Racism: Ridding Land Titles of Racial Covenants and Restrictions that Have a Segregative Effect
2:00 - 2:30 PM	Break	
2:30 - 3:45 PM	Opinions Potpourri: Hot Topics and Current Issues in Real Estate Finance Opinions	Role of Affordable Housing Programs in The Biden Administration's Social Safety Net Legislation

THURSDAY, APRIL 28

All times are Central Standard time

10:00 - 11:00 AM	Options, Rights of First Refusal and Rights of First Offer	Insurance and Risk Management in the Wake of Surfside
11:00 - 11:30 AM	Break	
11:30 AM - 12:30 PM	**JOINT** The Corporate Transparency Act- Welcome to the Future	
12:30 - 1:00 PM	Break	
1:00 - 2:00 PM	**JOINT** Faulty Appraisals and Assessment Gap: Racial Inequities in Home Appraisals and Assessment	
6:00 - 7:30 PM	**CONFERENCE RECEPTION** *An in-person event held at the Four Seasons Las Colinas. The reception will feature hors d'oeuvres, cocktails and networking. This is a ticketed event.	

REAL PROPERTY PROGRAMS AT-A-GLANCE

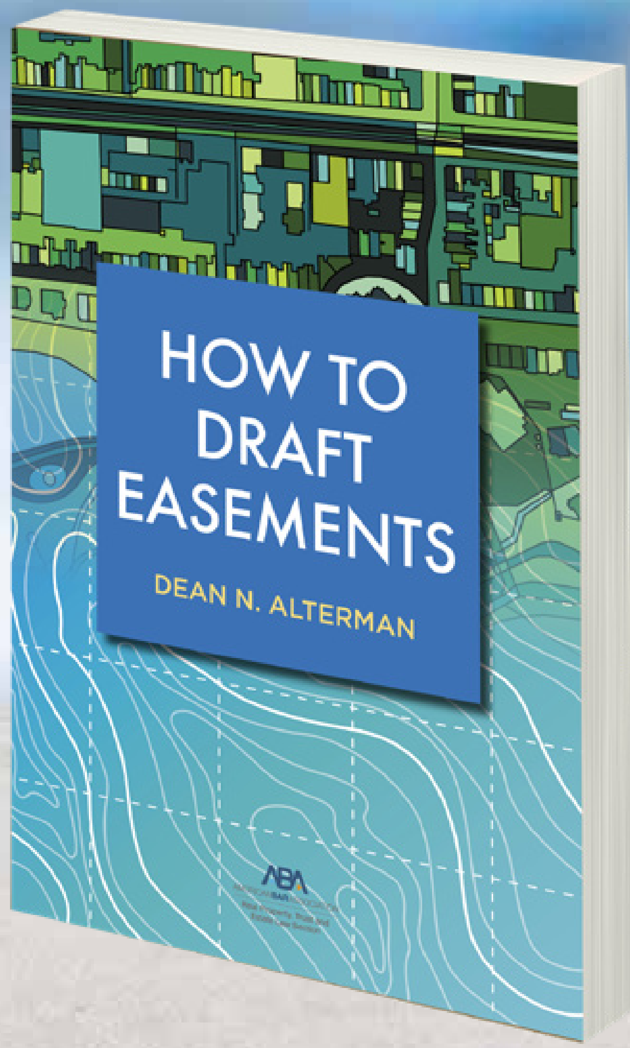
FRIDAY, APRIL 29

All times are Central Standard time

9:30 - 10:30 AM	Law Professors' Update
10:30 - 10:45 AM	Break
10:45 - 11:45 AM	The Great Debate in Valuing Big Box Stores - A Collaboration with the Appraisal Institute
11:45 AM - 12:00 PM	Break
12:00 - 1:00 PM	A Fireside Chat with the U.S. Commissioner of Internal Revenue * This program will be conducted with speakers presenting live from Dallas
1:00 - 1:15 PM	Break
1:15 - 2:15 PM	**JOINT** Caring for Yourself While Caring for Others * This program will be conducted with speakers presenting live from Dallas
2:15 - 2:30 PM	Break
2:30 - 3:30 PM	**JOINT** Keeping (Women) Lawyers in Practice * This program will be conducted with speakers presenting live from Dallas

REAL PROPERTY BOOKS

Check out our library of Real Property, and Trust and Estate Law Books



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Real Property, Trust and Estate Law Section

REAL PROPERTY BOOKS

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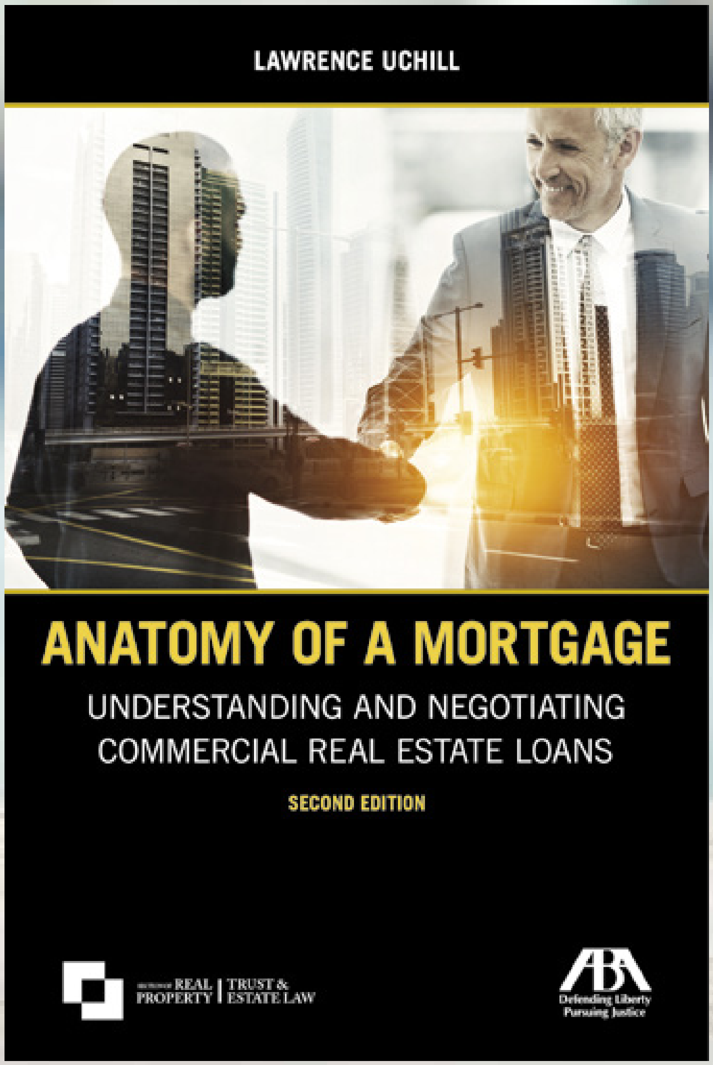

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TRUST AND ESTATE PROGRAMS AT-A-GLANCE

TUESDAY, APRIL 26

1:00 - 2:00 PM	Estate Planning in an Era of Heightened Tax Enforcement	Has Science Outpaced the Law? Updating the Paradigm on Evaluations of Capacity and Undue Influence in Trusts, Estates and Guardianships
2:00 - 2:30 PM	Break	
2:30 - 3:45 PM	What's Old Is New Again — Tax Uncertainty Or, How's Your 2022 Going?	Are Guardianships Toxic?

All times are Central Standard time

TRUST AND ESTATE PROGRAMS AT-A-GLANCE

WEDNESDAY, APRIL 27

All times are Central Standard time

10:00 - 11:00 AM	The Parent Trap: How the Uniform Parentage Act Demands Attention to Familial Relationships in Modern-Day Estate Planning	Business Succession and Estate Planning with ESOPs
11:00 - 11:30 AM	Break	
11:30 AM - 12:30 PM	Mine, Yours, Ours, Theirs - Issues with Non-Marital Cohabitants and Tips to Resolve Disputes Before They Occur	Past, Present, and Future of the Duty to Inform: Practical Guidance on Advising Trustees
12: 30 - 1:00 PM	Break	
1:00 - 2:00 PM	Planning for Divorce: What Every Estate Planner Needs to Know	Who is the Fiduciary? Traditional and Non-Traditional Roles in the Administration of Directed Trusts
2:00 - 2:30 PM	Break	
2:30 - 3:45 PM	Family Office Trends: The New Vocabulary of the Next Generation and Your Annual Non-Tax Hot Topics	State of Charitable Giving & What's a Donor to Do?: A Case Study

THURSDAY, APRIL 28

All times are Central Standard time

10:00 - 11:00 AM	Hot Topics in Business Planning	Don't Be Nonplussed, a Non-Grantor Trust Must Be Discussed
11:00 - 11:30 AM	Break	
11:30 AM - 12:30 PM	**JOINT** The Corporate Transparency Act- Welcome to the Future	
12:30 - 1:00 PM	Break	
1:00 - 2:00 PM	**JOINT** Faulty Appraisals and Assessment Gap: Racial Inequities in Home Appraisals and Assessment	
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TRUST AND ESTATE PROGRAMS AT-A-GLANCE

FRIDAY, APRIL 29

All times are Central Standard time

9:30 - 10:30 AM	How to Keep the Tail from Wagging the Dog: Difficult Client Counseling Scenarios	I'm Gonna Sue My Stepmother: Tales from the Life of a Successor Trustee. A case study approach to stepping into real estate in trusts Program sponsored by Whitter Trust Whittier Trust
10:30 - 10:45 AM	Break	
10:45 - 11:45 AM	Fixing a GST SNAFU	Latest Developments Facing the Legal and Banking Communities
11:45 AM - 12:00 PM	Break	
12:00 - 1:00 PM	A Fireside Chat with the U.S. Commissioner of Internal Revenue * This program will be conducted with speakers presenting live from Dallas	
1:00 - 1:15 PM	Break	
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TRUST AND ESTATE BOOKS

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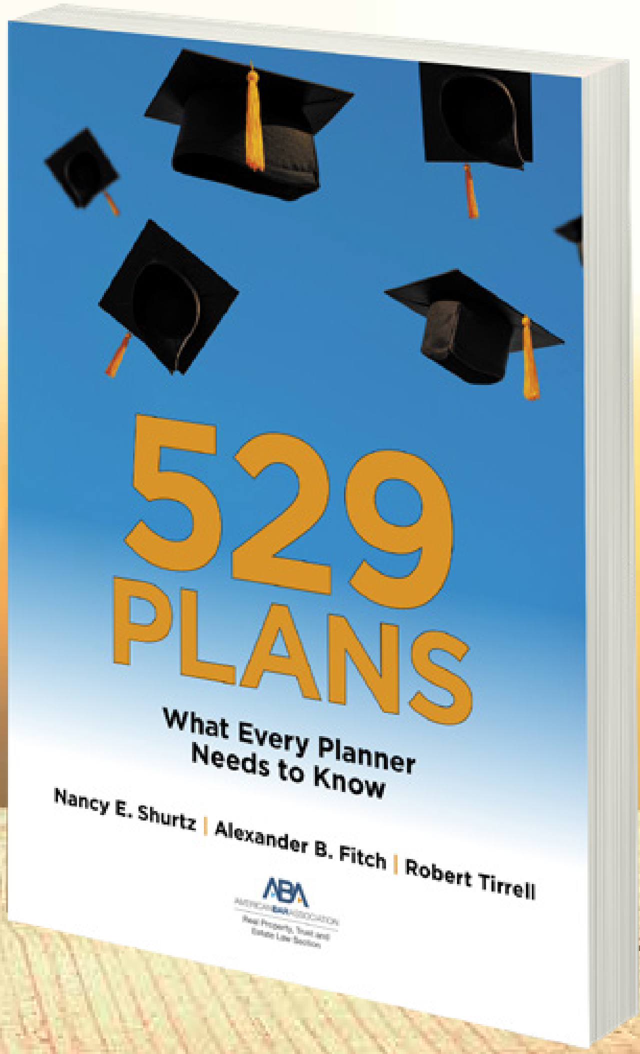

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Real Property, Trust and Estate Law Section

TRUST AND ESTATE BOOKS

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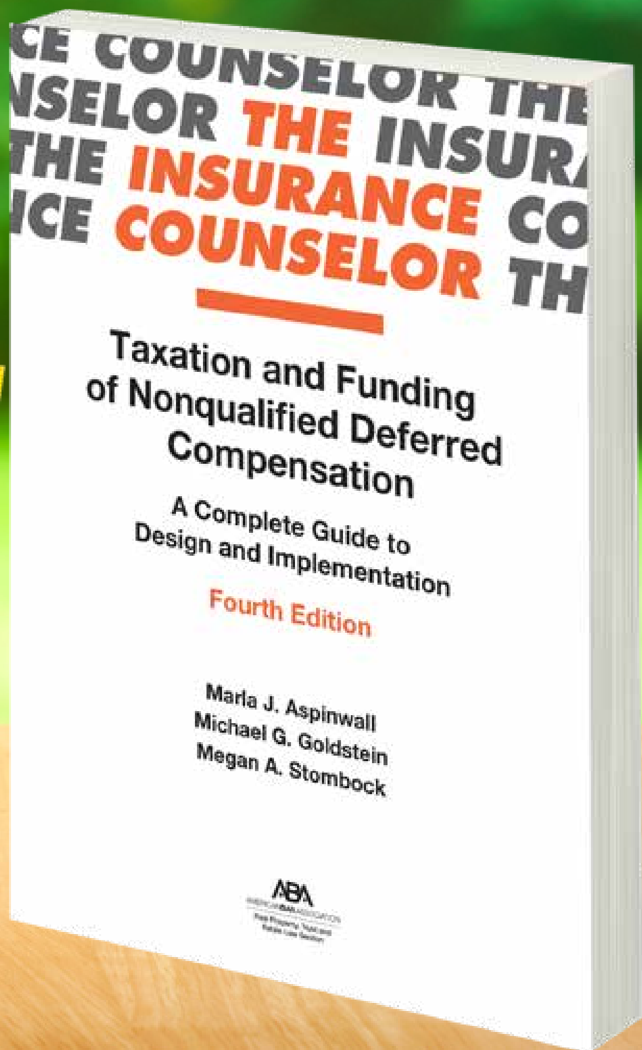

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ABA AMERICAN BAR ASSOCIATION
Real Property, Trust and Estate Law Section

Real Property Programs

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REAL PROPERTY DIVISION PROGRAMS

TUESDAY, APRIL 26

All times are Central Standard Time

1:00 – 2:00 PM

Loan Basics: Recourse Guarantees

A discussion of recourse guarantees and traditional "above the line" and "below the line" carve-outs.

Program Chair and Moderator:
Kari L. Larson
K&L Gates LLP
Seattle, Washington

Speakers:
Heather A. Horowitz
K&L Gates LLP
New York, New York

Dennis D. Kiely
K&L Gates LLP
New York, New York

1:00 – 2:00 PM

SALT Cap Workaround: Planning Opportunities and Traps to Avoid

The 2017 Tax Cuts and Jobs Act eliminated the ability to deduct state and local taxes ("SALT") in excess of $10,000. In response, a growing number of states (19 so far) have adopted a workaround, which involves a partnership or S Corporation electing to pay a new state level tax. IRS guidelines have been issued that allow a partnership or S Corporation to deduct that new tax in determining its income passed through to its owners. The workaround can be of assistance to real estate partnerships as well as family businesses that are often operated in a partnership, LLC, or S Corporation. The panel will explore these workarounds and discuss planning opportunities, which can achieve significant tax savings in high tax states, as well as possible traps for out of state partners or shareholders to avoid.

Program Chair and Speaker:
Philip R. Hirschfeld
Buchanan, Ingersoll & Rooney PC
New York, New York

Speakers:
Catherine Chiou
Andersen Tax
New York, New York

Glenn Newman
Greenberg Traurig LLP,
New York, New York

2:30 – 3:45 PM

End of the Road: Key Considerations in Ground Lease Surrenders

This take on a classic leasing program will explore numerous considerations that the parties to a ground lease should consider as they approach the end of the lease term. The panel will also explore surrender considerations that the parties should consider when negotiating a new ground lease.

Program Chair and Speaker:
Imran Naeemullah
Cades Schutte LLP
Honolulu, Hawaii

Speakers:
Allison Nelson
Akerman LLP
Denver Colorado

Melissa S. Vandewater
Seyfarth Shaw LLP
Chicago, Illinois

2:30 – 3:45 PM

Navigating Defaulted CMBS Loans from the Borrower's and the Special Servicer's Perspectives

Meet the Servicer, hear from the borrower side, and learn what the pooling and servicing agreement has to say about the process.

Program Chair and Moderator:
Laura S. Bouyea
Venable LLP
Baltimore, Maryland

Speakers:
Wallace E. Christner
Venable LLP
Washington, D.C.

Alex Killick
CWCapital Asset Management LLC
Washington, D.C.

Kevin Thompson
Iron Hound Management Company, LLC
New York, New York

Gina A. Zentz
Venable LLP
Baltimore, Maryland

REAL PROPERTY DIVISION PROGRAMS

WEDNESDAY, APRIL 27

All times are Central Standard Time

10:00 – 11:00 AM

Playing Chess: How to Best Position Your Landowner/Developer Client for Potential Litigation of Land Use/Permitting Applications

This program is geared toward land use attorneys and litigators. While land use law is local and specific to each jurisdiction, there are general standards for applications and approvals that broadly apply, i.e., establishing by competent substantial evidence that the applicant meets all the criteria required for approval. This program will approach land use applications from a litigation perspective, focusing on how land use attorneys can effectively position their client to either (1) defend a lawsuit challenging an application approval, or (2) prosecute claims against the local governing body for a wrongful denial of the application.

Speakers:

Shane T. Costello
Hill Ward Henderson
Tampa, Florida

William S. Dahlstrom
Jackson Walker LLP
Dallas, Texas

Scott A. McLaren
Hill Ward Henderson
Tampa, Florida

10:00 – 11:00 AM

The Not-So Standard, Not-So Retail Shopping Center

The nature of retail shopping centers is rapidly evolving to include non-retail uses and, in most centers, the non-retail uses keep growing. The addition of such uses (e.g. entertainment, medical and office uses) to a retail center creates challenges under existing shopping center documents such as leases and development covenants. These limitations may keep landlords, developers, and even anchor tenants from making the adaptations necessary to succeed as a modern shopping center because they are bound by restrictions from an earlier era. In order for a center to succeed into the future, the stakeholders must find a way to address such issues as follows:

- Do provisions in leases or restrictive easement agreements permit non-retail uses at the Development;
- Do these non-retail tenants satisfy co-tenancy obligations;

Speakers:

Anita S. Agajanian
DLA Piper LLP
Boston, Massachusetts

David C. Camp
Senn Visciano Canges PC
Denver, Colorado

Colleen R. MacRae
Nyemaster/Goode PC
Des Moines, Iowa

Ruth A. Schoenmeyer
Eversheds Sutherland LLP
Chicago, Illinois

Sheila M. Small
Live Nation, House of Blues Entertainment
Los Angeles, California

- How do you address getting approval from tenants with rights to approve;
- How do you modify existing documents restricting non-retail uses;
- How do you govern the different hours of operation, parking requirements, and other operational issues arising in a mixed-use center, and;
- What structural changes might you need at the development to address operational concerns or governmental requirements, such as emergency access for medical uses?

11:30 AM – 12:30 PM

Emerging Sustainability Issues in Real Estate Transactions

Sustainability issues are becoming more important to clients, and thus, their attorneys, in transactions involving real property. These issues include green leasing, including the COVID-19-inspired push for healthier buildings; environmental, social and governance ("ESG") investing; EPA initiatives to newly regulate hundreds of chemicals as hazardous substances; and government infrastructure and social spending plans, including funding to address climate change and build affordable housing. Obtain insights and practice tips from private practitioners and an in-house Ph.D. consultant regarding issues and trends they are encountering and addressing with buyers, sellers, tenants and lenders.

Program Chair and Speaker:
Nancy J. Rich
Katten Muchin Rosenman LLP
Chicago, Illinois

Moderator:
Andrew S. (Drew) Miller
Kemp Smith LLP
Austin, Texas

Speaker:
Carol A. Parnell
Littelfuse Corporation
Chicago, Illinois

11:30 AM – 12:30 PM

Don't Be Casual about Casualty Provisions

As major hurricanes, floods, winter storms wildfires and other natural disasters become more frequent, they affect not only the built landscape but the transactional landscape as well. The panel will take a fresh look at the sometimes overlooked casualty provisions in a purchase and sale agreement and discuss insurance issues raised by these disasters in the sale context.

Program Chair and Speaker:
James Slaton
Stone Pigman Walther Wittmann L.L.C.
Baton Rouge, Louisiana

Moderator:
Christina Jenkins
Christina Jenkins PLLC
Dallas, Texas

Speakers:
Debbie S. Crockett
Cheffy Passidomo PA
Tampa, Florida

Marcus Eagan
Eagan Insurance Company
New Orleans, Louisiana

1:00 – 2:00 PM

Let Your Light Shine Even When the Wind Blows: Wind and Solar Leases

Here comes the sun! If you feel like the answer is blowing in the wind, join us for this overview of wind and solar leases covering:

- Candle in the wind (wind and solar leases and easements);
- Shine on (real estate issues in renewable energy deals); and
- Inherit the wind (title issues).

Program Chair and Speaker:
Karen M.T. Nashiwa
Nashiwa Law, LLC
Lake Oswego, Oregon

***Speakers*:**
Spencer Davis
Mercer Thompson LLC
Atlanta, Georgia

Olufunke O. Leroy
Holland & Knight LLP
Philadelphia,Pennsylvania

Darnella J. Ward
Chicago Title National Commercial Services
Seattle, Washington

1:00 – 2:00 PM

Redacting Racism: Ridding Land Titles of Racial Covenants and Restrictions that Have a Segregative Effect

The racial upheavals witnessed in 2020 reminded us that there is still much work to be done in order to remove the vestiges of slavery and discrimination. In housing specifically, several discriminatory policies and practices exist that negatively affect families of color, especially Black families. The discriminatory policies and practices can be found in everything from racially restrictive covenants to exclusionary zoning. This session will explore the history of some of these policies and practices. The panel will also look at some proposed legal solutions, including uniform laws. Join us as we explore eliminating the discriminatory barriers to affordable housing.

Program Chair and Moderator:
Bomopregha A. Julius
New York, NY

Speakers:
Richard Brooks
New York University School of Law
New York, New York

Carol N. Brown
University of Richmond School of Law
Richmond, Virginia

Dwight Merriam
Law Office of Dwight Merriam
Weatogue, Connecticut

2:30 – 3:45 PM

Opinions Potpourri: Hot Topics and Current Issues in Real Estate Finance Opinions

This program will feature a discussion of hot topics and current issues in real estate finance opinions. All participants who give or receive opinions will benefit from the discussion, but this program is oriented towards practitioners with substantial experience in real estate finance opinion practice. Topics to be addressed will be based upon the latest developments closer to the date of the program, but will likely include:

- Delivery mechanics: authorizing the release of the opinion letter in electronic closings, multi-jurisdictional closings, and other settings;
- Evolution of assignees' ability to rely on opinions and so-called Wachovia language;
- Assuming execution and delivery when parties close electronically;
- Split opinions: when multiple firms are contributing to the opinions; and
- Bandera v. Boardwalk: 194 pages of guidance for opinion givers.

Program Chair and Moderator:
Imran Naeemullah
Cades Schutte LLP
Honolulu, Hawaii

Speakers:
Cheryl A. Kelly
Thompson Coburn LLP
St. Louis, Missouri

Marilyn C. Maloney
Liskow & Lewis
Houston, Texas

Charles L. Menges
McGuireWoods
Richmond, Virginia

Sterling Scott Willis
Fishman Haygood L.L.P.
New Orleans, Louisiana

2:30 – 3:30 PM

Role of Affordable Housing Programs in The Biden Administration's Social Safety Net Legislation

The Biden administration has proposed ambitious social safety net legislation. This program will explore the role of affordable housing and community development programs in such legislation.

Topics to be addressed include:

- HUD updates/HUD budget;
- Demand vs. supply-side affordable housing interventions;
- Tax credits;
- Community revitalization funds;
- Main street revitalization programs;
- Zoning reform programs; and
- Other legislation-related updates proposed by our expert panelists.

Speakers:
Schuyler Armstrong
Telesis Corporation
Washington, D.C.

Ethan Handelman
U.S. Department of Housing and Urban Development
Washington, D.C.

Priya Jayachandran
National Housing Trust
Washington, D.C.

George Weidenfeller
Telesis Corporation
Washington, D.C.

REAL PROPERTY DIVISION PROGRAMS

THURSDAY, APRIL 28

All times are Central Standard Time

10:00 – 11:00 AM

Options, Rights of First Refusal and Rights of First Offer

This program will address the challenges in drafting and interpreting options, rights of first refusal, and rights of first offer in various contexts, including purchase agreements, leases, and financing transactions. The program will further discuss the title issues that arise in connection with these rights.

Program Chair and Moderator:
Ryan T. Christiansen
Liskow & Lewis
New Orleans, Louisiana

Speakers:
Jonathan M. Bogues
Forrest Firm
Raleigh, North Carolina

Sarah Cline
Shulman Rogers
Potomac Maryland

Kathleen K. Law
Nyemaster Goode, P.C.
Des Moines, Iowa

10:00 – 11:00 AM

Insurance and Risk Management in the Wake of Surfside

The problem of aged and underfunded condominiums and condominiums that are not well maintained or are structurally compromised can be devastating as we saw in the Surfside property in Florida. However, such natural, environmental or catastrophic impacts on condominium buildings are not unique to Florida. This program will explore the current state, new trend and development as to how to handle and manage risks for condominium buildings in catastrophe-prone areas as well as unforeseen and rare Surfside-like events:

- Unique condominium issues compared and contrasted against other types of buildings;
- The required and recommended insurance coverage;
- Board liability associated with such events and Directors & Officers insurance coverage;
- Changes in the insurance market, risk mitigation measures, and the role of insurance when a condominium/community association regime is terminated due to a catastrophe; and
- Whether shifts in the insurance market will affect board liability and the operation of condominium associations.

Program Chair:
Versely Rosales-Hart
Alderman, Devorsetz & Hora, PLLC
Washington, D.C.

Moderator and Speaker:
Christopher N. Davies
Dentons Cohen & Grisby, P.C.
Naples, Florida

***Speakers*:**
Michelle M. King
Gallagher Insurance
Rolling Meadows, Illinois

Loretta G. Mince
Fishman Haygood LP
New Orleans, Louisiana

Patricia Wilderotter
CCIG Insurance
Enlgewood, Colorado

11:30 AM – 12:30 PM

JOINT DIVISION PROGRAM

The Corporate Transparency Act- Welcome to the Future

The Corporate Transparency Act (CTA) and the implementing regulations create a national registry of entity ownership. This panel will help you understand:

- Who needs to report;
- What information needs to be reported;
- Who will have access to that information;
- How that information can be used; and
- The consequences of failing to provide the required information.

Program Chair and Speaker:
Stephen Liss
Shiff Hardin LLP
New York, New York

Speakers:
Imaan Moughal
Manice & Budd LLP
New York, New York

John R. Strohmeyer
Strohmeyer Law PLLC
Houston, Texas

1:00 – 2:00 PM

JOINT DIVISION PROGRAM

Faulty Appraisals and Assessment Gap: Racial Inequities in Home Appraisals and Assessment

Although the Fair Housing Act protects against discrimination in the home selling and buying process, the practice of undervaluing homes owned by Black people and members of racial and ethnic minority groups persists. These undervaluations affect the ability of individuals to borrow, refinance and ultimately build wealth-based on the most traditional way. In addition, the assessment gap between market value and the assessed value creates racial inequity in property taxation. This program will explore how appraisals fit into the homeownership process, current issues involving racial inequities in home appraisals and assessments, direct and indirect outcomes resulting from racial inequities in appraisals and assessments, fair housing considerations and enforcement, and possible policy solutions and how practitioners can contribute to support solutions.

Speakers:
Timnetra Burruss
Cook County Board of Review
Chicago, Illinois

William Garber
The Appraisal Institute
Washington, D.C.

Bryan Green
National Association of Realtors
Washington, D.C.

Morgan Williams
National Fair Housing Alliance
Washington, D.C.

6:00 – 7:30 PM

CONFERENCE RECEPTION

An in-person event held at the Four Seasons Las Colinas. The reception will feature hors d'oeuvres, cocktails and networking.
This is a ticketed event

REAL PROPERTY DIVISION PROGRAMS

FRIDAY, APRIL 29

All times are Central Standard Time

9:30 – 10:30 AM

Law Professors' Update

The panelists will discuss developing issues and movements in the law of takings, housing and property including:

- Whether recent decisions, Knick and Cedar Point Nursery, along with changes in court composition, signal a change in the path ahead for takings law; and whether the single passing comment in Alabama Association of Realtors, suggests an expanded view of what is property;
- Whether the pending reinstatement of the Obama-era rule for Affirmatively Furthering Fair Housing, in the context of its regulatory history, raises issues for the decision-making of participating jurisdictions who are recipients of CDBG and HOME public funding; and
- To what extent does the use of new housing technologies that leverage big data or make use of surveillance technology negatively impacts low-income communities.

Program Chair and Moderator:

Shelby D. Green
Pace University Elisabeth Haub School of Law
White Plains, New York

Speakers:

Carol N. Brown
University of Richmond School of Law
Richmond, Virginia

Rosa Newman-Ruffin
Loyola University School of Law
New Orleans, Louisiana

Etienne Toussaint
University of South Carolina School of Law
Columbia, South Carolina

10:45 – 11:45 AM

The Great Debate in Valuing Big Box Stores – A Collaboration with the Appraisal Institute

The valuation of big box stores has developed into a highly contentious topic. At the core of the controversy is the valuation method known as the "Dark Store Theory," which has prompted heated debate between municipal assessors and property owners as to whether the theory's use artificially deflates property tax assessments. This program will explain the traditional methods of valuing single tenant retail facilities and analyzes the Dark Store Theory, legal challenges to the theory, and legislative initiatives to prohibit its use.

Program Chair and Speaker:

C. Scott Schwefel
Shipman, Shaiken & Schwefel, LLC
West Hartford, Connecticut

Moderator and Speaker:

R. Marshall Grodner
McGlinchey Stafford PLLC
Baton Rouge, Louisiana

Speaker:

Paula Konikoff
The Appraisal Institute
Los Angeles, California

12:00 – 1:00 PM

PLENARY LUNCHEON

* This program will be conducted with speakers presenting live from Dallas

A Fireside Chat with the U.S. Commissioner of Internal Revenue

The Honorable Charles P. Rettig, U.S. Commissioner of Internal Revenue, will join us over lunch, fireside chat style, for a discussion with immediate past RPTE Chair Stephanie Loomis-Price to discuss recent developments at the Internal Revenue Service, enforcement efforts, COVID-19's impact on the IRS and taxpayers, and the Commissioner's changing perspectives about the IRS since transitioning from defending taxpayers before the IRS to serving as Commissioner after his appointment to the post in 2018. The discussion will provide conference attendees a unique opportunity to hear the Commissioner's insights on transfer tax concerns and real property tax issues.

Speakers:

Hon. Charles P. Rettig
U.S. Commissioner of Internal Revenue
Washington D.C.

Stephanie Loomis-Price
Winstead
Houston, Texas

1:15 – 2:15 PM

JOINT DIVISION PROGRAM

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Caring for Yourself While Caring for Others

Whether you are a transactional lawyer or litigator, and whether you work in the public or private or private sector, it is likely that you have at least two jobs – being a lawyer and being a caregiver. The term "caregiver" includes not just those who care for children, but also those that help with aging parents, caring for adult children with special needs, and an array of other situations. This panel will address the growing and often not talked about issue of balancing being a caregiver and being a lawyer, The panel is not intended to address "work-life" balance, but rather emotional balance, wellness balance, and the ability to meet the demands of the job and family throughout the day. Especially in the time of COVID-19, when those who need us most might be in our houses while we work from home, it is becoming increasingly important to set boundaries, establish appropriate coping mechanisms, and prioritize an individual's own health and well-being. Panelists will share their stories of caring for children and loved ones and how they forged through challenging times. Additionally, a family therapist on the panel will opine on techniques that we can all use to achieve both family and career goals.

Speakers:

Abigail Earthman
Winstead, PC
Dallas, Texas

Stephen Liss
Shiff Hardin
New York, New York

Crystal Patterson
Gulfstream
Owensboro, Kentucky

Damien Robinson, MA, LPC
ATX Mental Health
Austin, Texas

Sarah Robinson, LCSW-S
ATX Mental Health
Austin, Texas

Martin Shenkman
Martin Shenkman, PC
Fort Lee, New Jersey

2:30 – 3:30 PM

JOINT DIVISION PROGRAM

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Keeping (Women) Lawyers in Practice

In recent years, the ABA's Commission on Women in the Legal Profession has published multiple reports confirming that female attorneys are not only leaving their law firms, they are leaving the legal profession entirely. The first report, titled "Walking Out the Door," was published pre-pandemic in 2019 and from all accounts the pandemic has only exacerbated the issues causing the exodus of women from the legal profession. We are in a transformational time with a pandemic that has shifted our attitudes about the workplace, amid a generational shift of those in practice. The time is ripe to reevaluate historic mindsets about what it takes to have a successful practice and the viability of being able to maintain that practice while balancing career, family, and personal wellbeing – with the goal of keeping more women in practice. The panel will discuss the reports published by the ABA Commission on Women in the Legal Profession and the discourse following the Commission's May 3, 2021 meeting. They will also share their experiences in recently starting their own law firms with these considerations in mind.

Speakers:

Marissa Dungey
Dungey Dougherty PLLC
Greenwich, Connecticut

Dana M. Foley
Arnold & Porter Kaye Scholer LLP
Washington, D.C.

Christina Jenkins
Christina Jenkins PLLC
Dallas, Texas

Trust and Estate Programs

TRUST AND ESTATE DIVISION PROGRAMS

TUESDAY, APRIL 26

All times are Central Standard Time

1:00 – 2:00 PM

Estate Planning in an Era of Heightened Tax Enforcement

Taxation of high-net-worth individuals and families has been a focus of many parties. One consistently recommended component for closing the "tax gap" is an overhaul of the IRS through increased funding. In this presentation, the panelists will discuss: (i) what is and has been on the enforcement horizon, and (ii) what it might be like working with "IRS 2.0," a more fully funded organization, in 2022 and beyond. This panel includes a representative from IRS Office of Chief Counsel, who will discuss its perspective on trends.

Speakers:

Benjamin A. Cohen-Kurzrock
Baker Botts LLP
Houston, Texas

Andrew R. Comiter
Comiter, Singer, Baseman & Braun LLP
Boca Raton, Florida

Kathryn A. Meyer
Internal Revenue Service Office of Chief Counsel
Portland, Oregon

1:00 – 2:00 PM

Has Science Outpaced the Law? Updating the Paradigm on Evaluations of Capacity and Undue Influence in Trusts, Estates and Guardianships

The same testing and adjudicative standards for assessing decisional capacity and vulnerability to undue influence have been applied for decades. Planners, litigators and courts rely on mental health professional assessments of capacity, vulnerability to undue influence, and competence in many contexts, including drafting testamentary instruments, litigating will and trust contests, and guardianships. The law has not kept up with medical research or current thinking, especially in relation to dementia spectrum disorders. The panel will explore developments in medical research and consider how current science regarding these disorders should shape the legal analysis of incapacity and vulnerability, positing that current standards are insufficient to meet medical realities.

Highlights will include:

- Comments from a geriatric/forensic psychiatrist who is directly involved in leading medical

Program Chair:

Eric N. Hoffstein
Fogler Rubinoff LLP
Toronto, Ontario, Canada

Speakers:

Robert Barton
Holland & Knight LLP
Los Angeles, California

Sandra D. Glazier
Lipson Neilson, P.C.
Bloomfield Hills, Michigan

Kenneth Shulman, MD, SM, FRCPsych, FRCP(C)
Sunnybrook Health Sciences Centre
Toronto, Ontario, Canada

research and has been qualified as an expert witness in capacity proceedings;

- A discussion of the limitations of current testing methods and the future of capacity assessments;
- A discussion of how the legal analysis of incapacity and vulnerability should be modified to more accurately apply current research findings;
- Practical advice for practitioners on applying today's legal standards using current medical science; and
- A bibliography of authoritative papers and texts supporting a new paradigm for assessments of decisional capacity and vulnerability to undue influence.

2:30 – 3:45 PM

What's Old Is New Again – Tax Uncertainty Or, How's Your 2022 Going?

The outlook for estate planning in April 2022 may or may not be any clearer than it was at the beginning of the year. Join us as we discuss hot topics based on the latest flapping of butterfly wings from Capitol Hill. The panel will address the latest in tax developments and planning ideas, including:

- Case law update, including penalties;
- A report from Capitol Hill, looking at both domestic and international planning; and
- Update from the IRS Art Appraisal Services.

Program Chair and Moderator:

Keri Brown
Baker Botts LLP
Houston, Texas

Speakers:

Eli Akhavan
Norton Rose Fulbright
New York, New York

Benjamin Cohen-Kurzrock
Baker Botts LLP
Houston, Texas

Kenneth N. Jefferson
Holland & Knight
Washington D.C

Melisa Seyhun
Schiff Hardin LLP
Chicago, Illinois

Sarah Verano
Withers Bergman LLP
New York, New York

2:30 – 3:45 PM

Are Guardianships Toxic?

Wards under a guardianship generally have fewer rights than prisoners. This program will explore guardianships, including vexing issues, possible solutions, and alternatives.

The panel will address:

- Issues with guardianships;
- Rights of wards under a guardianship and obligations of guardians/conservators;
- Recommendations of the Fourth National Guardianship Summit;
- Supportive decision making;
- Planning options and how to avoid guardianships;
- How to navigate within the system; and
- Restoration of rights of a ward.

Program Chair and Moderator:

Heidi M. Brown
Osterhout & McKinney, PA
Fort Myers, Florida

Speakers:

Karen Boxx
University of Washington School of Law
Seattle, Washington

Sandra D. Glazier
Lipson Neilson, P.C.
Bloomfield Hills, Michigan

David Godfrey
ABA Commission on Law and Aging
Washington, D.C.

Chasity Sharp Grice
Peppel, Grice & Palazzolo, P.C.
Memphis, Tennessee

WEDNESDAY, APRIL 27

ALL TIMES ARE CENTRAL STANDARD TIME

10:00 – 11:00 AM

The Parent Trap: The Uniform Parentage Act Demands Attention to Familial Relationships in Estate Planning

The Uniform Parentage Act (UPA) and other state laws are changing the way in which we define who is a parent and who is a child. Whether or not you are familiar with the UPA, it is important to know what changes would result if the UPA was enacted in your jurisdiction, and what tools we have to ensure that our clients' estate plans reflect and respect their personal concepts of family and desired descent. Did you know that in Texas, adoptees may retain inheritance rights from birth parents and adoptive parents? In some states, laws can result in recognition of three or more parents? There are pronounced differences from state to state as to who is a parent and who is a child. Although the UPA is regarded as an achievement of human rights by providing avenues for legally establishing parent-child relationships where previously lacking, its enactment nevertheless highlights the need to match client objectives as much to existing laws as to legislative trends. This panel will address these important considerations for estate and trust practitioners nationally, relevant national social and legislative trends, and key features of the UPA itself.

Moderator:

Carole M. Bass
Sullivan & Worcester LLP
New York, New York

Speakers:

Cara M. Koss
Arnold & Porter LLP
Washington, D.C.

William M. LaPiana
New York Law School
New York, New York

Joanna Morrison
UBS
Chicago, Illinois

Lisa G. Page
Dungey Dougherty PLLC
Greenwich, Connecticut

10:00 – 11:00 AM

Business Succession and Estate Planning with ESOPs

Employee stock ownership plans (ESOPs) can be valuable tools to achieve the business succession and estate planning objectives of private business owners. Beginning with a discussion of ESOP basics and situations in which use of an ESOP might be an appropriate business succession strategy, the panel will address key estate planning and other considerations from the perspectives of the selling shareholders and the company, as well as the governance and fiduciary implications of employee ownership.

Program Moderator:
Karen K. Suhre
Attorney at Law
Kansas City, Missouri

Speakers:
Stanley E. Bulua
Robinson Brog
New York, New York

Joshua Caswell
Day Pitney LLP
Providence, Rhode Island

David A. Guadagnoli
Sullivan & Worcester LLP
Boston, Massachusetts

11:30 AM – 12:30 PM

Mine, Yours, Ours, Theirs - Issues with Non-Marital Cohabitants and Tips to Resolve Disputes Before They Occur

While most houses consist of four walls, the relationships, arrangements and agreements that bring people together within those walls can be very different. Many planning strategies to resolve disputes come from marital agreements or spousal rights under state law. However, laws often fall short in offering similar protections to unmarried cohabitants.

This panel will:

- Highlight issues around the increasing number of non-marital cohabitant relationships;
- Introduce the Uniform Cohabitants' Economic Remedies Act; and
- Provide planning tips for drafting cohabitation agreements.

Program Chair and Moderator:
Mary Elizabeth "Beth" Anderson
Wyatt, Tarrant and Combs, LLP
Louisville, Kentucky

Speakers:
Turney P. Berry
Wyatt Tarrant and Combs, LLP
Louisville, Kentucky

Erica B. Deutsch
Henderson, Caverly, Pum & Trytten LLP
Pasadena, California

Alex Tanouye
The Northern Trust Company
Washington, D.C.

11:30 AM – 12:30 PM

Past, Present, and Future of the Duty to Inform: Practical Guidance on Advising Trustees

The common law has long included an amorphous common law duty for trustees to inform trust beneficiaries. The Uniform Trust Code (UTC), adopted in an increasing number of states in recent years, imposes explicit proactive reporting requirements to beneficiaries. Too many non-professional trustees are unaware of these requirements and the risks they face for noncompliance.

The panel will address:

- A comparison of how the UTC reporting requirements are similar and differ from the common law rule;
- Guidance on how to advise trustees serving under pre-UTC trust documents of their obligations;
- Advice and disclosures that should be given to clients in the trust drafting process regarding the trustee's duty to inform; and
- A litigator's perspective of the risks to non-compliant trustees.

Program Chair and Speaker:

James I. Dougherty
Dungey Dougherty PLLC
Greenwich, Connecticut

Speakers:

Marve Ann M. Alaimo
Porter Wright Morris & Arthur LLP
Naples, Florida

Anthony L. Engel
Bessemer Trust
Chicago, Illinois

T. Sandra Fung
Withers Bergman LLP
New York, New York

1:00 – 2:00 PM

Planning for Divorce: What Every Estate Planner Needs to Know

The panel will address:

- Important provisions to include in pre and post nuptial agreements;
- Waiver of the spousal elective share;
- Current rules on transfers incident to divorce;
- Divorce and community property;
- How to define "spouse;"
- Ethical issues and joint representation; and
- Divorce and insurance.

Speakers:

Sharon Klein
Wilmington Trust
New York, New York

Stacey M. Valentine
Avelino Law, LLP
Summit, New Jersey

Jonathan W. Wolfe
Skoloff & Wolfe
Livingston, New Jersey

1:00 – 2:00 PM

Who is the Fiduciary? Traditional and Non-Traditional Roles in the Administration of Directed Trusts

With the growing prevalence of directed trusts, questions arise about considerations in drafting directed trusts to reflect the additional players involved and to address litigation risks that may arise during trust administration. The panel will focus on the roles of directed trustees and trust directors in the administration of directed trusts, the extent of their respective responsibilities, and the extent of the liability each may face.

The panel will address:

- Is the trust director a fiduciary and what is the extent of the director's liability;
- Is a trustee's obligation to follow the director absolute; and
- Can the directed trustee reduce liability for bad decisions of the director by keeping beneficiaries informed and if so, how to proceed?

Program Chair and Speaker:

Daniel Ebner
Prather Ebner LLP
Chicago, Illinois

Speakers:

Adam M. Ansari
Clark Hill PLC
Chicago, Illinois

Melissa Osorio Dibble
Archer & Greiner, P.C.
Haddonfield, New Jersey

Timothy M. Ferges
McCarter & English, LLP
Newark, New Jersey

2:30 – 3:45 PM

Family Office Trends: The New Vocabulary of the Next Generation and Your Annual Non-Tax Hot Topics

The family trends panel will address environmental, social, and governance investing (ESG) including what ESG is and why it is important to you and your clients.

The hot topics panel will discuss cases of interest in the trust and estate field and will address new laws.

Speakers:

Katarinna McBride
Focus Family Office Counsel
Vail, Colorado

Lisa G. Page
Dungey Dougherty PLLC
Greenwich, Connecticut

Laura-Min Proctor
William Blair
Private Wealth Management
Chicago, Illinois

Lee-ford Tritt
University of Florida
Levin College of Law
Gainesville, Florida

2:30 – 3:45 PM

State of Charitable Giving and What's A Donor to Do?: A Case Study

The panel will discuss:

- Charitable giving trends in the wake of the Tax Cuts and Jobs Act of 2017 and the expansion of the standard deduction;
- Effect of proposed changes to grantor trust regime on charitable lead trusts;
- Potential impacts of proposed changes to IRA distribution rules on charitable giving;
- Potential impacts to charitable giving as a result of increased tax rates and decreasing estate and gift tax exemption levels;
- Status of charitable deductions as a percentage of AGI and status of caps on or phase-outs of charitable deductions at certain income levels;
- Effect of proposed changes to basis rules on split interest gifts; and
- Review of important cases impacting charitable giving, charitable organizations, and donor-advised funds.

Program Chair and Speaker:

Kathryn H. Crary
Gadsden Schneider & Woodward LLP
Wayne, Pennsylvania

Moderator:

Christopher Hoyt
University of Missouri Law School
Kansas City. Missouri

Speakers:

Carly Doshi
HSBC Private Banking
New York, New York

Andrew S. Katzenberg
DLA Piper
New York, New York

Mark M. Parthemer
TIAA
Palm Beach, Florida

TRUST AND ESTATE DIVISION PROGRAMS

THURSDAY, APRIL 28

ALL TIMES ARE CENTRAL STANDARD TIME

10:00 – 11:00 AM

Hot Topics in Business Planning

The panel will discuss recent and noteworthy cases and guidance impacting business planning. The panel also will explore the effects that recently proposed (or pending) legislation would have on our clients and practices if enacted, recognizing that any provisions may be reintroduced in future legislation.

Program Chair:
Christine R.W. Quigley
Schiff Hardin LLP
Chicago, Illinois

Speakers:
Brent Berselli
Holland & Knight LLP
Portland, Oregon

Caitlin N. Horne
Moore & Van Allen
Charlotte, North Carolina

Emily A. Plocki
Venable
Washington, D.C.

10:00 – 11:00 AM

Don't Be Nonplussed, a Non-Grantor Trust Must Be Discussed

When it comes to trust planning, a non-grantor trust may be the optimal solution. Advantages may be seen in state income tax savings, the state and local tax (SALT) deduction, the 20% deduction under 199A, and the qualified small business stock (QSBS) exclusion under 1202. To help practitioners minimize the burden of higher trust tax rates and avoid many of the traps for the unwary, the panel will:

- Review the impact of recent tax reform; proposals related to the taxation of trusts;
- Provide tips for drafting non-grantor trusts; and
- Address the benefits of certain jurisdictions for non-grantor trusts.

Program Chair and Speaker:
Justin Miller
Evercore Wealth Management
San Francisco, California

Speakers:
Rachel M. Lee
Primiani, Stevens & Punim, P.C.
Los Angeles, California

Jennifer Smith
McCollom D'Emilio Smith Uebler LLC
Wilmington, Delaware

11:30 AM – 12:30 PM

JOINT DIVISION PROGRAM

The Corporate Transparency Act-Welcome to the Future

The Corporate Transparency Act (CTA) and the implementing regulations create a national registry of entity ownership. This panel will help you understand:

- Who needs to report;
- What information needs to be reported;
- Who will have access to that information;
- How that information can be used; and
- The consequences of failing to provide the required information.

Program Chair and Speaker:

Stephen Liss
Schiff Hardin LLP
New York, New York

Speakers:

Imaan Moughal
Manice & Budd LLP
New York, New York

John R. Strohmeyer
Strohmeyer Law PLLC
Houston, Texas

1:00 – 2:00 PM

JOINT DIVISION PROGRAM

Faulty Appraisals and Assessment Gap: Racial Inequities in Home Appraisals and Assessment

Although the Fair Housing Act protects against discrimination in the home selling and buying process, the practice of undervaluing homes owned by Black people and members of racial and ethnic minority groups persists. These undervaluations affect the ability of individuals to borrow, refinance and ultimately build wealth based on the most traditional way. In addition, the assessment gap between market value and the assessed value creates racial inequity in property taxation. This program will explore how appraisals fit into the homeownership process, current issues involving racial inequities in home appraisals and assessments, direct and indirect outcomes resulting from racial inequities in appraisals and assessments, fair housing considerations and enforcement, and possible policy solutions and how practitioners can support such solutions.

Speakers:

Timnetra Burruss
Cook County Board of Review
Chicago, Illinois

William Garber
The Appraisal Institute
Washington, D.C.

Bryan Green
National Association of Realtors
Washington, D.C.

Morgan Williams
National Fair Housing Alliance
Washington, D.C.

6:00 – 7:30 PM

CONFERENCE RECEPTION

An in-person event held at the Four Seasons Las Colinas. The reception will feature hors d'oeuvres, cocktails and networking. This is a ticketed event.

TRUST AND ESTATE DIVISION PROGRAMS

FRIDAY, APRIL 29

ALL TIMES ARE CENTRAL STANDARD TIME

9:30 – 10:30 AM

How to Keep the Tail from Wagging the Dog: Difficult Client Counseling Scenarios

The panel will address difficult client counseling scenarios and ethics rules regarding allocation of responsibility between lawyer and client, including:

- Clients committed to or interested in a course of action you consider ill-advised;
- Clients so focused on achieving tax savings that their plans become overly complex or difficult to administer; and
- Clients suggesting that you advance an argument that you believe is inappropriate or unhelpful.

Program Chair and Moderator:
Laura M. Twomey
Simpson Thatcher & Bartlett, LLP
New York, New York

Speakers:
Robert Barton
Holland & Knight LLP
Los Angeles, California

Jaclyn G. Feffer
Bessemer Trust
New York, New York

Kim V. Heyman
Rose Glen, LLC
Wynnewood, Pennsylvania

9:30 – 10:30 AM

Program sponsored by Whitter Trust

WhittierTrust

"I'm Gonna Sue My Stepmother": Tales from the Life of a Successor Trustee. A case study approach to stepping into real estate in trusts.

Plan to discuss three specific client scenarios where the following are in common:

- Widow of deceased spouse became successor trustee upon his death
- Widow was not well-equipped to be the successor trustee in terms of managing the assets
  - Assets consist of real estate assets and marketable securities
  - Poor management or lack of management led to a decline in the value of the trust
- Step-children of the widow sued to remove her as successor trustee
  - In one scenario, the step-children became successor trustee and then fought among themselves

Speaker:
Thomas Frank
EVP & Northern California Regional Manager
Whittier Trust

- In 2 scenarios, a neutral third party trustee was sought
- Particular emphasis on thorny issues relating to real property held in trust.

10:45 – 11:45 AM

Fixing a GST SNAFU

The improper allocation of generation skipping transfer tax exemption continues to cause issues for many clients. This panel will focus on common errors and the tools available to fix them, including late allocations, qualified severance, and 9100 relief.

Program Chair and Moderator:
Sasha Klein
PricewaterhouseCoopers LLP
Palm Beach, Florida

Speakers:
Stephen L. Ham IV
Skadden, Arps, Slate, Meagher & Flom LLP
New York, New York

Brian K. Janowsky
Schiff Hardin LLP
New York, New York

Julie M. Kwon
McDermott Will & Emery LLP
Menlo Park, California

10:45 – 11:45 AM

Latest Developments Facing the Legal and Banking Communities

The National Conference of Lawyers and Corporate Fiduciaries (NCLCF) is a standing committee consisting of a select group of RPTE members who interface with members of the American Bankers Association throughout the year, most notably in the context of annual joint meetings. In the past, access to those meetings has exclusively been limited to the members of the committee. Last year, for the first time, the NCLCF presented highlights of these recent discussions to the RPTE Section membership. This year we will continue this new tradition and discuss hot trends and recent developments at the intersection of the legal and banking communities.

Program Chair:
Anthony R. La Ratta
Archer & Greiner, P.C.
Voorhees, New Jersey

Speakers:
Lori Campbell
Bank of America
Dallas, Texas

Phoebe A. Papageorgiou,
American Bankers Association
Washington, D.C.

12:00 – 1:00 PM

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Stephanie Loomis-Price
Winstead PC
Houston, Texas

1:15 – 2:15 PM

JOINT DIVISION PROGRAM

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Dallas, Texas

Stephen Liss
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Crystal Patterson
Gulfstream
Owensboro, Kentucky

Damien Robinson, MA, LPC
ATX Mental Health
Austin, Texas

Sarah Robinson, LCSW-S
ATX Mental Health
Austin, Texas

Martin Shenkman
Martin Shenkman, PC
Fort Lee, New Jersey

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Dungey Dougherty PLLC
Greenwich, Connecticut

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Washington, D.C.

Christina Jenkins
Christina Jenkins PLLC
Dallas, Texas

transformational time with a pandemic that has shifted our attitudes about the workplace, amid a generational shift of those in practice. The time is ripe to reevaluate historic mindsets about what it takes to have a successful practice and the viability of being able to maintain that practice while balancing career, family, and personal well-being – with the goal of keeping more women in practice. The panel will discuss the reports published by the ABA Commission on Women in the Legal Profession and the discourse following the Commission's May 3, 2021 meeting. They will also share their experiences in recently starting their own law firms with these considerations in mind.

REGISTRATION

Rates

ABA RPTE Member:	$475
ABA Member:	$530
Non-ABA Member:	$575
Conference Speaker/Academic/Government Attendee:	$475
Law Student Attendee:	No Charge

Meeting Format

The 34th Annual RPTE National CLE Conference will be presented virtually. Registrants will be granted online access to all CLE programs, session materials, MCLE certificates, access to our Conference exhibitors, and more! Registrants will have the opportunity to participate remotely both in real-time and later, on-demand.

We will also afford registrants the ability to watch all our virtual programs together, in-person, at the Four Seasons Resort and Club Las Colinas, in Dallas, Texas at the time of their broadcast. Anyone participating in this manner will be required to comply with all active local protocols and ABA policies regarding in-person meetings as they relate to COVID-19 prevention at the time of our meeting.

All sessions conducted as part of the 34th Annual RPTE National CLE Conference will be available for viewing virtually. Session panelists will deliver their remarks from remote locations. The final three sessions, which will be conducted on Friday, April 29, will be conducted with panels presenting live from Dallas. These sessions include the Plenary Luncheon featuring the 49th U.S. Commissioner of Internal Revenue and Joint Division Programs "Caring for Yourself While Caring for Others" and "Keeping Women in Practice." These sessions will be broadcast live and registrants will have the option to either attend in-person or view them on our Conference website. Please note that in-person attendance at the Plenary Luncheon will require a ticket which may be purchased at a cost of $75 each.

Please indicate your intention to attend in-person via our registration page.

Registering Online

Register online at rpteconference.com. Online registration is available now and will continue to be open through the Conference. To register at discounted rates, ABA members will need an ABA identification number, which may be found on your ABA membership card. Non-ABA members may register online by creating a new customer account. You may also join the ABA and Section to take advantage of the discounted member rates. Please contact the ABA Service Center at (800) 285-2221 if you need help with the online registration system or if you need assistance in locating your membership number.

Virtual Program Access

Login details will be emailed to registrants during the week of the Conference. Using a unique login, attendees will be able to access a customized landing site with entree to a Virtual Lobby where all sessions can be viewed/entered during the event. Registrants will have the ability to access the virtual platform before the start of Conference to build their own schedule and set up their individual account page, where attendees can add a headshot, biographical information and adjust their privacy settings. Online assistance will be available throughout the Conference. A link to the program materials will be available to registrants for downloading or printing. All registered attendees will be sent this link during the week of the Conference.

Cancellation Policy

Requests for refunds must be made in writing and emailed to **rptespring@americanbar.org** no later than **April 15, 2022.** A $75 administrative fee will be deducted from the amount refunded. The Section will gladly accept substitute registrants for cancellations received at any time.

CLE Credit

The ABA will seek 10 hours of CLE credit in 60-minute states, and 12 hours of CLE credit for this program in 50-minute states including 2 hours of CLE specialty ethics credit in 60-minute states, 2.4 hours of CLE specialty ethics credit in 50-minute states, 1 hour of CLE specialty elimination of bias credit in 60-minute states and 1.2 hours of CLE specialty elimination of bias credit in 50-minute states. Credit hours are estimated and are subject to each state's approval and credit rounding rules. Please visit the program website at **rpteconference.com** for program-specific CLE details or visit **americanbar.org/mcle** for general information on CLE at the ABA.

*Florida Bar regulators have stated that attorneys will not receive Florida credit for any ABA program, even if they self-apply.

Hotel Information

We have negotiated special group rates at the Four Seasons Las Colinas of **$279** (deluxe single or double occupancy) per night, plus taxes. The reservation deadline for the group rate is April 5, 2022. If necessary, cancellations must be made at least 72 hours prior to the scheduled arrival to avoid a one-night cancellation charge. Reservations may be made by calling Four Seasons Las Colinas at **972-717-0700**. Be sure to mention you are attending the **"RPTE National CLE Conference and Leadership Meeting"** to receive the group rate. Rooms may also be booked online **https://book.passkey.com/e/50272357**.

Travel Discounts

With ABA Egencia, you can automatically obtain ABA negotiated airfare discounts for travel to the ABA Meetings. ABA Egencia enables you to purchase the best airfare at the time of booking, by providing you with the ability to search for and compare fares from virtually every airline serving the destination. Reservations with ABA Egencia can be made online or offline. For offline reservations, call (877) 833-6285. ABA Egencia is available online at **www.egencia.com** via ABA Travel Services. ABA airfare discounts on some carriers may also be obtained by purchasing your tickets under the ABA Discount Codes directly from the airline or through your travel agent.

*A Travel Profile is required when booking airline reservations with ABA Egencia.

Financial Assistance

A limited number of scholarships is available based on need. The scholarships range from a 25% to a 50% tuition discount. Scholarship applications must be submitted by April 15, 2022 in order to be considered. Decisions regarding the applications will be announced no later than April 22, 2022. Complete the application at **rpteconference.com**.

Persons with Disabilities

Services for persons with disabilities can be arranged. If arrangements are required, please notify Christopher Meacham at **christopher.meacham@americanbar.org**.

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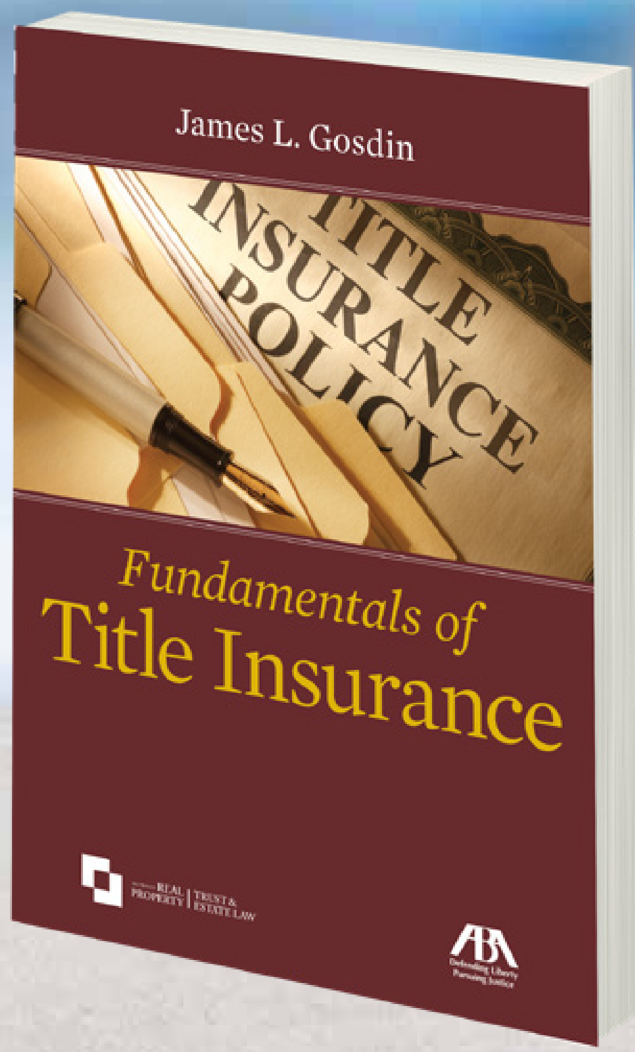

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AMERICAN BAR ASSOCIATION
Real Property, Trust and Estate Law Section

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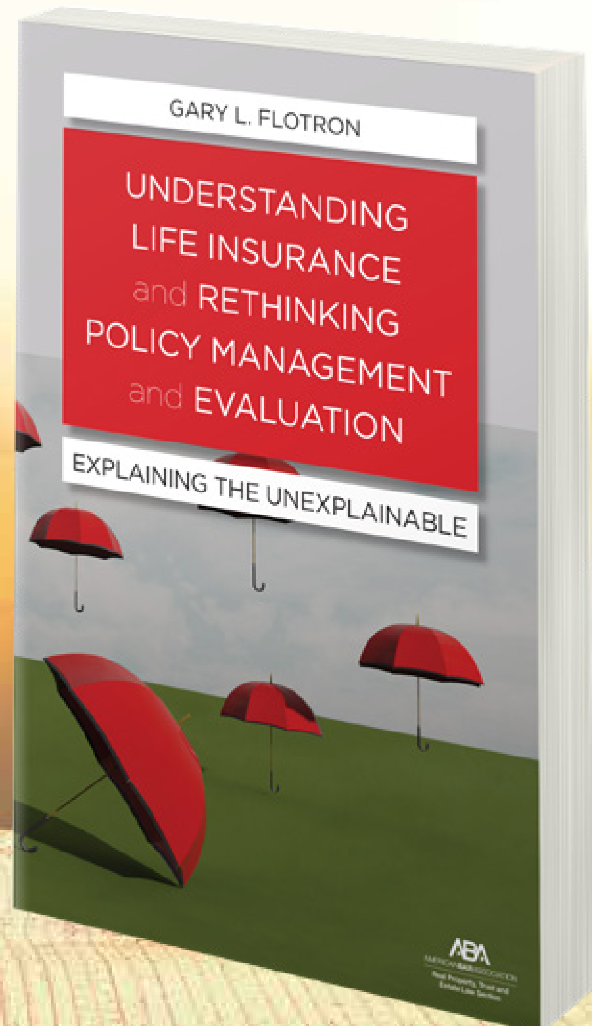

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