

**DETAILED COURSE SCHEDULE – PROGRAM SIX
DECEMBER 3, 2021 – KANSAS CITY**

8-8:15 a.m.	Introduction by Program Chair, Hugh Gill
8:15-9:15 a.m.	Post Mortem Tax Planning for A/B Trust Plans, Hugh Gill
9:15-10:30 a.m.	Fiduciary Income Tax, Janet Rae Montgomery
10:30- 10:45 a.m.	Break
10:45 a.m.-12 p.m.	Retirement Planning in the Light of the Proposed Regs -or- Planning for the Difficult Beneficiary, Kathy Sherby
12 -1 p.m.	Lunch with ACTEC Fellows, Program Sponsors
1-1:55 p.m.	Estate Tax Apportionment: A Hazard of Being on the Road, Doyle Sanders
1:55-2:50 p.m.	Practical Issues with Estate and Gift Tax Returns, Kent Meyerhoff
2:50-3:05 p.m.	Break
3:05-4 p.m.	State Income Taxation of Trusts, Emily Kembell
4 p.m.	Adjournment, Hugh Gill

Please note that attendance will be verified for each session.

Sincere thanks to our Session III Sponsors



BCG
Valuations



MIDWEST
TRUST



Country Club Trust
COMPANY



mpi Incisive, Rigorous &
Trusted: Since 1939



CUMBERLAND
TRUST



UBS
Investments. Planning. Lending.
Baumgarten Dowell Jones Wealth Management



GREATER KANSAS CITY
COMMUNITY FOUNDATION™



UMB



Willamette Management Associates