



ALL PROGRAMS

Registration & Networking – 11:30 to 12:00 PM ~ Lunch & Program – 12:00 to 1:15 PM

Cost: \$35 Members, \$55 Guests MAC Downtown ~ Cost: \$45 Members, \$60 Guests Saint Louis CLUB

SEPTEMBER 19, 2022

Location: Saint Louis Club

Preparing for the Next Congressional Tax Tsunami while Avoiding Premature Activation of Our Own Estate Plans

Guest Speaker: Louis S. Harrison



OCTOBER 24, 2022

Location: MAC Downtown

Business Planning Strategies – Tips, Traps and Common Mistakes

Guest Speakers: Ann B. Burns and Justin Whitney

NOVEMBER 14, 2022

Location: Saint Louis Club

Cryptocurrency & Crypto Tax Returns

Guest Speaker: Zac McClure



DECEMBER 12, 2022

Location MAC Downtown

FLPs in Tax Court: Emphasizing the Discount for Lack of Marketability (DLOM)

Guest Speakers: Sonia Desai & Will Frazier



JANUARY 23, 2023

Location: Saint Louis Club

St. Louis Practicing Scholars Series: Best Planning Ideas For 2023

**Panel: Steve Gorin, John Scott, Michael Tessler
Moderator: Kathleen Bilderback**



**FEBRUARY 8, 2023 – Extended Session
Joint Program with FPA**

Location: MAC Downtown

11am Check-In

11:10am-12pm Trusts as Beneficiaries of IRAs

*12pm - 1 Lunch; 12:30pm-1 AMA (Ask Michael Anything)
1:10pm – 2:00pm Life & Death Tax Planning for Deferred Annuities*

Guest Speaker: Michael Kitces

MARCH 20, 2023

Location: MAC Downtown



St. Louis Practicing Scholars Series: Trust Fiduciaries

Panel: T. Jack Challis, Carolyn Ohlsen, Samir Tayob

Moderator: Michael Foster



APRIL 24, 2023

Location: MAC Downtown

St. Louis Practicing Scholars Series: Estate Planning Ethics

Panel: Clary A. Redd, Kathy Sherby, Michael Downey

Moderator: Jason Thein

MAY 22, 2023 - Extended Session

Location: MAC Downtown

11:35 am-12:35 pm Planning for Clients with Chronic Illness and Disability

12:45-1:45pm Religious Considerations in Estate Planning

Guest Speaker: Martin M. Shenkman

