INDEPENDENT TRUSTEE ALLIANCE
ANNUAL CONFERENCE
MAY 13, 2021
Dallas, Texas

“Being a Trustee in an uncertain world”

Dallas/Addison Marriott Quorum by the Galleria
14901 Dallas Parkway Dallas, Texas 75254

All sessions will be streamed live for attendees not able to join in person.

AGENDA	All times are Central Time Zone		
Thursday May 13, 2021			
8:00am	Continental Breakfast		LOCALE
8:30am	Welcome	Kevin Quinn	In Person
8:45am	“Crisis Planning for Persons with Disabilities”	Ann Koerner	In Person
9:45am	Break		
10:00am	“Embracing Disruption as a Catalyst for Change”	Jane Beddall	Remote
11:00am	“Planning in the light of tax uncertainty	Tom Pauloski	Remote
12:00pm	Lunch with Roundtable discussion		
1:00pm	“Impact of Residency….”	Jim Roberts, Esq	In Person
2:00pm	“The Evolving Role of Fiduciaries in Addressing the Needs of the Affluent Family”	Courtney Pullen	Remote
3:00pm	Break		
3:15pm	“But What’s an Ascertainable Standard?...”	Christian Kelso, Esq.	In Person
4:15pm	Roundtable discussion	Roundtable	
5:00pm	Adjourn Group dinner may be organized		

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SESSION DETAILS

Crisis Planning for Persons with Disability

Ann Koerner

This program includes practical information regarding planning for natural crisis – flood, blizzard, ice storm, tornado, hurricane, fire or a family crisis - illness/death of a primary family member caregiver or home manager. The presentation includes planning for having to leave your home or shelter in place in your home. Handouts include preparedness lists from the CDC and other government agencies – including planning for pets and farm animals. This presentation also gives information on “best practices” for Trustees and other professionals in managing the office, accessibility, and communication during crisis. Very practical, real life examples and case studies are used throughout the presentation.

Embracing Disruption as a Catalyst for Change

Jane Beddall

For more than a year we have all experienced disruption. It is understandable that we yearn for it to end. Yet as challenging as disruption is, it also presents opportunities. How do we make the most of this unusual time to improve our client relations, collaborative partnerships, professional development and more? We will focus on practical ideas and practices to adopt for current and future success.

Planning in the light of tax uncertainty

Daniel L. Brunello, CFP®, CEPA

How to effectively plan with the likelihood if tax increases but with nothing yet set in stone.

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BH Burgher Haggard

Arosa Care Elevated

SESSION DETAILS

Impact of Residency of Trustees, Beneficiaries & Managers on State Income, Creditor and Divorce Laws
Jim Roberts, Esq.

This presentation will look at how different states' laws impact trusts, trustees and beneficiaries in the areas of state income tax, spendthrift (creditor) protection and beneficiary divorce including child support.

The Evolving Role of Fiduciaries in Addressing the Needs of the Affluent Family
Courtney Pullen, M.A.

But What's an Ascertainable Standard? Clarifying HEMS distribution standards and other fiduciary considerations for trustees
Christian Kelso, Esq.

A deep dive into discretionary trust distributions, with a particular emphasis on the HEMS standard.

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SESSION DETAILS

Ann Koerner (www.nationalcareadvisors.com)
President and Founder of National Care Advisors

Ann Koerner is President and Founder of National Care Advisors – a firm dedicated to providing consulting services for attorneys, financial planners and trustees. National Care Advisors provides care and quality of life planning services for those families faced with physical disability, mental illness, developmental disability, or eldercare issues. Services include planning and case management applicable to Special Needs Trusts and government benefits preservation National Care Advisors also specializes in post-litigation resolution consulting services specific to lien negotiation, Medicare Set Aside projections and administration.

Prior to the inception of National Care Advisors in 2008, Ann's nursing practice has been dedicated to developing effective disability management solutions for injured and ill workers. As a result of her work with many national corporations, Ann possesses extensive business knowledge of case management, utilization review, third party payers, workers' compensation, private insurance companies and government resources.

Ann received her Bachelor of Science in Nursing degree from Russell Sage College in Troy, New York. She began her nursing practice as a Public Health Nurse in New York and then continued that practice with the City of Columbus Health Department in Ohio. Her combined expertise in analysis of future care and quality of life needs, cost projections, and knowledge of third party benefits is significant to her success as a consultant. She has served as an expert witness throughout the United States for litigated cases involving medical malpractice and injury lawsuits.

National Care Advisors serves clients in all 50 states and is known for client-centered, practical solutions to meeting the needs of individuals and families with special needs challenges.

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SESSION LEADERS

Jane Beddall (www.dovetailresolutions.com)
Founder and Principal of Dovetail Resolutions, LLC

Jane Beddall is the founder and principal of Dovetail Resolutions, LLC, where she focuses on preserving and improving relationships in extended families and family enterprises. Preventing damaging conflict is a key part of that work. Jane is a certified CINERGY® Conflict Management Coach, seasoned transformative mediator, facilitator, and consultant. Jane is also a certified Conflict Dynamics Profile® Practitioner. She holds Certificates in Family Wealth Advising and Family Business Advising from the Family Firm Institute.

Jane is a member of the Purposeful Planning Institute, the Family Firm Institute, and the Association for Conflict Resolution. In 2014 she received The Honorable Robert C. Zampano Award for Excellence in Mediation. Jane is a past President of the New England Chapter of the Association for Conflict Resolution and past Co-chair of the Alternative Dispute Resolution Section of the Connecticut Bar Association.

Jane graduated from Trinity College (Hartford, CT) with a B.A. in Economics. She received her law degree, *cum laude*, and her M.A. in Public Policy Analysis, with a concentration in Conflict Resolution, from the University of Pennsylvania. Her career has included service as a VISTA volunteer, a judicial clerkship, the private practice of law, service in the public sector, and not-for-profit work. Jane has taught at the University of Connecticut School of Law and at the University of New Haven (Alternative Dispute Resolution).

In January 2019, she launched the weekly podcast *Crafting Solutions to Conflict* ~ providing a practical and positive perspective on conflict, available through all major apps and its dedicated website.

You can learn more about Jane and her work here:
https://linkedin.com/in/janebeddall
https://craftingsolutionstoconflict.com

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SESSION LEADERS

Tom Pauloski, J.D. (https://www.bernstein.com)

THOMAS J. PAULOSKI is National Managing Director for Wealth Planning and Analysis, the research division of Bernstein Private Wealth Management's Private Client Group. He works with private clients and their advisors on wealth transfer strategies, focusing on tax-efficient wealth management and asset allocation decisions. Previously, Tom was a partner at the Chicago law firm of Winston & Strawn LLP, where he concentrated his practice in estate, tax, and business planning. Tom also has been a member of the Chicago law firm of Levin & Schreder, Ltd., a Vice President in the Private Client Group of Zurich Life in Long Grove, Illinois, and a partner at the Chicago law firm of Schiff Hardin & Waite.

Tom is a nationally known speaker on estate planning, tax, and insurance issues, and has written numerous articles and continuing legal education materials on estate planning topics. He serves on the faculty of the American Bankers Association National Trust and National Graduate Trust Schools, and has served on the adjunct faculty of the Cannon Financial Institute Schools. Tom has been an adjunct professor at Loyola University Chicago School of Law and has taught estate planning classes at Northwestern University Law School. Tom also has served on the editorial board of *Trusts & Estates* magazine. He retired from the United States Naval Reserve in 2003, after 21 years of service.

Tom received his bachelor of science degree in environmental engineering from Northwestern University, and his juris doctor, *magna cum laude*, from Loyola University Chicago School of Law, where he served as editor-in-chief of the *Loyola Law Journal*.

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SESSION LEADERS

Jim Roberts, Esq. (https://www.gpm-law.com)

Mr. Roberts is Board Certified in Estate Planning and Probate Law. His practice focuses on estate planning (gift and estate tax issues, trusts, wills, family limited partnerships and business succession strategies), income tax issues ancillary to those fields (compensation and retirement planning, 1031 exchanges, and trust, partnership and corporate tax matters), and state law issues related to those areas of planning. He handles estates of all sizes – from simple estates, to very sophisticated and complicated matters involving family business of all sizes and substantial wealth. In doing so, he has become very familiar with business entity creation, including corporations, limited liability companies and partnerships, and the impact those types of entities have on both estate and gift tax strategies as well as on income tax planning.

Mr. Roberts is licensed in Texas and Colorado. He also frequently assists attorneys in other states in federal estate and gift tax planning. He is a frequent speaker on a number of subjects related to estate planning and tax issues.

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SESSION LEADERS

Courtney Pullen, M.A. (https://www.pullenconsulting.com)

Courtney Pullen M.A. is the President of the Pullen Consulting Group. He has more than 25 years of experience as an innovative leader in family wealth consulting. Courtney specializes in working with affluent families by tackling the complexity of wealth. He helps the family and its individual members thrive through values retreats, family meetings, leadership and succession trainings as well as individual coaching.

He brings forth his training as a psychotherapist, business and organizational consultant and pioneer of wealth psychology and blends these modalities into a powerful model to support the family business or the family enterprise.

He recently published, *Intentional Wealth: How Families Build Legacies of Stewardship and Financial Health.* He has also been interviewed and quoted by numerous publications including *The Wall Street Journal, Barron's, Atlantic Trust: The Advisor and Business Week.* He is also on CPWA faculty at the University of Chicago Booth School of Business.

Courtney has lectured frequently, conducted numerous workshops and been published in the areas of individual and organizational change, behavioral finance, communication and family wealth dynamics. He is a former contributing editor to the *Journal of Financial Planning* and the *Journal of Practical Estate Planning* and is a faculty member of the *Sudden Money Institute.* He is also a graduate of the Newfield coaching program.

He has spoken at regional and national conferences of the Financial Planning Association (FPA), National Association of Personal Financial Advisors (NAPFA), Investments & Wealth Institute (formerly IMCA), and Young Presidents' Organization (YPO), as well as estate planning symposiums and family foundation conferences.

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SESSION LEADERS

Christian S. Kelso (www.fghwlaw.com)

Christian S. Kelso is a partner at the law firm of Farrow-Gillespie Heath Witter, LLP where he practices in the areas of estate planning, wealth preservation and transfer, probate, tax and transactional corporate law. His legal practice focuses primarily on finding practical, cost-effective solutions for families and businesses to avoid costly, and often heartbreaking disputes in both the courtroom and the living room. Christian is a counselor who is dedicated to making the law work for his clients and helping them understand how best to address the legal issues they face.

Outside of his law practice, Christian also serves as facilitator and advisor for families wishing to implement family systems and governance. His book, *Building Your Castle: A practical guide for protecting your legacy*, is available on Amazon and at www.christiankelso.com. Christian is dedicated, as he puts it, to avoiding the disastrous 'Family Power Vacuum' that occurs when a family patriarch becomes disabled or passes away.

Christian is a native Dallasite, having attended St. Mark's School of Texas for twelve years before moving on to the University of Texas at Austin. Christian came back to Dallas for his J.D. and LL.M. (Taxation), both of which he received at Southern Methodist University. Christian is an active member of the community in North Texas and sits on charitable boards and other governing bodies. He speaks German fluently and lives in Dallas with his wife and two children.

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