

FINANCIAL AND ESTATE PLANNING COUNCIL OF METROPOLITAN DETROIT

NOVEMBER 2020

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upComing EventS

COMPLIMENTARY WEBINAR PROGRAMS - SEE PAGES 5 AND 6

11-18-20, 4:00 PM / Samuel A. Donaldson, JD, LLM, AEP

[REGISTER HERE](https://us02web.zoom.us/webinar/register/WN_1Q2WyHubS86BmifD-zBOnQ)

12-8-20, 11:00 am / Jill L. Miller, JD

[REGISTER HERE](https://us02web.zoom.us/webinar/register/WN_k2fuCfcNSwmceKC0G74GfA)

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**STATE OF THE DETROIT COUNCIL**

 As many of you know, we typically hold the FEPCMD annual business meeting during the November event. However, due to these unprecedented times and in compliance with the current Detroit Council bylaws, the Board has unanimously approved that we "stay the organization". This means that the annual business meeting will be postponed until November 2021, and the current 2020 Board of Directors, excluding the retiring directors, will continue to serve in the same leadership roles as 2020. This additional Board service will not impact the length of service bylaws requirement for Board members and officers. Please don't hesitate to call any of the Detroit Council leaders if you have any questions.

 I wish to thank each Board member personally for their time and dedication this year. As stated above, during these unprecedented times your Board worked together seamlessly to ensure that we continued to uphold our commitment to our members and sponsors in ensuring that we brought additional virtual programs to replace our in-person events. Above all, I wish to recognize and thank Kris Wolfe for her dedication, professionalism, and her outstanding contribution as our Administrator in truly making our council a "Council of Excellence." Every in-person and virtual event that we present to our members is orchestrated by Kris and her eye for excellence truly is appreciated by me and the rest of the Board. Lastly, a special thank you to Rob Labe, JD, LLM, and Colleen Theuerkauf, CFP, AIF, MBA, who are retiring from the 2020 Board.

 The Detroit Council leaders will continue to provide virtual events as we head into 2021 with the hope of seeing each other at in-person events sometime in 2021. Please don't hesitate to send topic and presenter recommendations to the Association office at fepcmd@associationoffice.org .

 We are so grateful for the support we have received from the Detroit Council 2020 sponsors. Don't forget to visit the new FEPCMD [Sponsor Showcase](https://www.metrodetroitfepc.org/council/aboutAddl) to see a brief description of our sponsors.

 Thank you to the Detroit Council members for your past and continued support. We especially appreciate you transitioning to the virtual event format. A review of the 2020 programs may be found on page 4.

 I wish you all a Happy Thanksgiving and good health as we close out 2020.

2020 FEPCMD Sponsors

[**BDO**](http://www.bdo.com/)[**Jackson National**](https://www.jackson.com/index.xhtml)[**Berry Moorman**](http://www.berrymoorman.com/)[**Jaffe**](https://www.jaffelaw.com/)

[**Butzel Long**](https://www.butzel.com/)[**Kercheval Financial Group of Wells Fargo Advisors**](https://home.wellsfargoadvisors.com/kercheval)

[**Chemical Bank**](https://www.chemicalbank.com/)[**Lifetime Financial Growth of Michigan**](https://www.lifetimefinancialgrowth.com/)

[**CIBC**](https://www.cibc.com/en/personal-banking.html)[**Maddin Hauser**](http://www.maddinhauser.com/)

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Sally Vaughn, CTFA

President

**FEPCMD 2020 Programs & Sponsorship Benefits**

**February 11, 2020**

* In-Person Event at The Skyline Club featuring R. Hugh Magill
* “Estate Planning & Trust Management For a Brave New World: It’s All in the Family….What’s a Family”

**24/7 On Demand Complimentary Webinar**

* Jonathan G. Blattmachr, Esq, AEP, Mitchell Gans, JD, Martin Shenkman, CPA/PFS, MBA, JD, AEP, Paul Gentile / “How I’m Changing My Practice and Client Meetings to Address the Coronavirus”

**May 13, 2020 Complimentary Virtual Event**

* Carsten Hoffmann and Aaron Stumpf / “The Current State of Discount Valuations”

**June 29, 2020 Complimentary Virtual Event**

* Brian E. Raftery / “Use It Or Lose It…Spousal Lifetime Access Trusts”

**July 29, 2020 Complimentary Virtual Event**

* Natalia Kujan Gentry, Esq / “Considerations in Embarking in In Vitro Fertilization”

**September 9, 2020 Complimentary Virtual Event – Sponsors were invited to have their firm attend – sponsors also received additional visibility with the co-sponsoring organizations’ membership**

* Ben Rathbun, CAWC, MBA / “Michigan Auto Insurance No-Fault Reform”

**October 26, 2020 Complimentary Virtual Event**

* Sara Schimke, Esq / “Special Needs Planning 2020”

**November 11-18-20 Complimentary Virtual Event**

* Samuel Donaldson, JD, LLM AEP / “Now What? How Recent Developments Affect Contemporary Estate Planning”

**December 8, 2020 Complimentary Virtual Event**

* Jill Miller, Esq / “Choosing the Right Fiduciary”

**NOTE:** The April 20, 2020 Lunch and Learn Event, May 6, 2020 Breakfast Event, and May 18, 2020 golf outing were cancelled in March due to COVID. Later in the year, the September 17, 2020 and November 18, 2020 dinner meetings were cancelled and replaced with virtual events due to the ongoing COVID issues.

**THE FINANCIAL AND ESTATE PLANNING COUNCIL OF METROPOLITAN DETROIT**

**Presents**

# WEDNESDAY, NOVEMBER 18, 2020

**AGENDA:**

 **4:00 PM Cocktail Tutorial / 4:05 PM Webinar Presentation / 5:05 pm to 5:15 pm Q&A**

**COMPLIMENTARY WEBINAR**

[**REGISTER HERE**](https://us02web.zoom.us/webinar/register/WN_1Q2WyHubS86BmifD-zBOnQ)

**Samuel A. Donaldson, JD, LLM, AEP®**

**“Now What? How Recent Developments**

**Affect Contemporary Estate Planning”**



**PLUS:**

 **“Cocktails With Sam”**

**Learn How to Make Sam’s Favorite Cocktail – The Aviation**

* **This informative and entertaining presentation will explain how recent developments, including the 2020 election, impact contemporary estate planning strategies.**
* **Will incomplete non grantor trusts still be a thing? Can we expect any changes to the scheduled increases in the applicable exclusion amount? How should individuals plan today in light of rules that might soon change?**
* **Included in the presentation is a recap of important developments in the federal income, estate, and gift tax laws over the past 12 months.**

**SAMUEL A. DONALDSON** [J.D. University of Arizona; LL.M. (Taxation) University of Florida] is a Professor of Law at Georgia State University in Atlanta. Prior to joining the Georgia State faculty in 2012, he was on the faculty at the University of Washington School of Law in Seattle for 13 years. During his tenure at the University of Washington, he was a five-time recipient of the Philip A. Trautman Professor of the Year award from the School of Law’s Student Bar Association. Professor Donaldson served for two years as Associate Dean for Academic Administration and for six years as the Director of the law school’s Graduate Program in Taxation. He teaches a number of tax and estate planning courses, as well as courses in the areas of property, commercial law and professional responsibility. Professor Donaldson is an Academic Fellow of the American College of Trust and Estate Counsel (ACTEC) and a member of the Bar in Washington, Oregon, and Arizona. Among his scholarly works, he is a co-author of the popular West casebook, *Federal* *Income Tax: A Contemporary Approach*, and a co-author of the *Price on Contemporary Estate Planning* treatise published by Wolters Kluwer. Professor Donaldson has served as the Harry R. Horrow Visiting Professor of International Law at Northwestern University and a Visiting Assistant Professor at the University of Florida Levin College of Law. An amateur crossword constructor, his puzzles have been published in *The New York Times*, *The Los Angeles Times*, *The Washington Post, The Wall Street Journal*, and other outlets.

**THE FINANCIAL AND ESTATE PLANNING COUNCIL OF METROPOLITAN DETROIT**

**Presents**

# TUESDAY, DECEMBER 8, 2020

**AGENDA:**

 **11:00 am presentation – 11:50 am Q&A**

**COMPLIMENTARY WEBINAR**

[**REGISTER HERE**](https://us02web.zoom.us/webinar/register/WN_k2fuCfcNSwmceKC0G74GfA)

**Jill L. Miller, JD**

**“How To Choose A Fiduciary”**



Choosing the right fiduciaries in the initial planning stage is a critical part of the estate planning process. One that can mean the difference between the smooth administration of an estate, with family harmony and low professional fees, or a protracted difficult process that can result in family fractures. This program will discuss the different types of fiduciaries, the job description of each, and provide practical pointers on how to make the right decision. A planning professional who is aware of the importance of these decisions can add significant value to their client and their relationship. This program will also contain an interactive workshop where attendees can go through the process of choosing their fiduciaries and determining if they themselves have made the right choices.

**Jill Miller, the principal of Jill Miller & Associates, P.C., focuses on formulating sophisticated and highly personalized estate plans for individuals and families with the objectives of minimizing estate taxes and family discord. She also has a particular expertise in estate matters affecting non-US citizens and non-traditional families. Jill takes a detailed and practical approach to the administration of estates. Complicated probate issues are addressed and resolved. Estate tax returns are prepared to minimize the risk of audit.**

**.Jill founded the firm in January of 2004, after working for over a decade in trusts and estates law. Jill is a fellow of the American College of Trust and Estate Counsel and is a frequent lecturer on estate planning at both private and public symposia. Jill is currently the Director of the Estate Planning Clinic and adjunct professor of Law at Cornell Law School and was an Adjunct Professor at Fordham Law School, teaching Trusts and Estates from 2005 to 2014. Jill is AV Preeminent Peer Review rated by Martindale-Hubbell and is named as a Super Lawyer.**