ALBUQUERQUE COMMUNITY FOUNDATION
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Estate Planning Conference
March 7, 2025
9:00 am – 5:30 pm
There will be a five-minute break between each session

Opening Remarks **9:00am**
Albuquerque Community Foundation

Planning Through Uncertainty **9:10am – 10:10am**
Ken Leach

The presentation will be on planning during the uncertainty in view of a new administration in Washington, possible changes in tax law and policy and the issues that estate planners need to be aware of when planning during these uncertain times.

Flexible Uses of Life Insurance in Estate Planning **10:15am – 11:15am**
Brad Justice

Life insurance can be a tool to maximize flexibility in estate planning when designed properly, especially in a time with pending changes in exemption limits. This session will revisit the different types of life insurance policies and how they can be strategically placed in an estate plan. It will conclude with a few current financial planning topics with broad applications for clients.

Equitable Estate Planning through a Trauma-Informed Lens **11:20am – 12:20pm**
Sarah K. Jaeger

This presentation will focus on strategies and tools that attorneys and law firms can use when providing estate planning services to diverse populations. Key topics of discussion will include (1) the ways in which bringing a trauma-informed lens into estate planning can create better access to justice; and (2) key considerations when working with LGBTQIA individuals, multicultural families, and survivors of abuse and/or violence.

Lunch **12:20pm – 1:10pm**

Disability Planning Unpacked: Focus on Special Needs Planning Tools
Feliz Martone **1:10pm – 2:10pm**

This presentation will explore key legal and financial strategies to secure the future of individuals with disabilities. This presentation will cover essential tools such as ABLE accounts, Special Needs Trusts, and Social Security disability benefits, ensuring long-term protection and financial stability. Attendees will gain practical insights to navigate complex planning with confidence.

Ethical Issues in Estate and Trust Administration **2:15pm – 3:15pm**
Stella Edens Pederson

Steering through the stormy seas of final administration: How lay and professional fiduciaries can get into tricky situations and how to avoid crashing on the shore.

ABCs of Estate Planning with Retirement Accounts **3:20pm – 4:20pm**
Sara Traub

This presentation explores the veritable alphabet soup of current estate planning with retirement accounts, including the SECURE Act, RMDs, QCDs, and more.

How Do I Effectively Communicate with a Client or Beneficiary? What If I Have to Give Them "Unpleasant News **4:25pm-5:25pm**
John Attwood

We all have clients that have a basic understanding of the role we play in their lives. As the role varies from investment advisor to CPA, to Estate Planning Attorney to Trust Officer, our method of communication varies. How do we "effectively" communicate and maximize the impact of our expertise with our client or beneficiary? It's easy to communicate "good news" but what if we face a downturn in the market or our client has a significant tax liability or the expectations of our estate planning client or beneficiary is well beyond what is reasonable? Let's learn from each other: communication skills, best practice and creative methods to transfer concepts relevant to our clients.

Closing **5:25pm**