

ACTEC Trust and Estate Talk Schedule 2024

Podcast #	Presenter(s)	Title	Post Date
280	ACTEC Fellow Kevin Matz	The Opportunity Zones Transparency, Extension, and Improvement Act	January 2, 2024
281	ACTEC Fellow Professor Gerry W. Beyer	AI and Trust and Estate Law: The Future Is Here to Stay	January 9, 2024
282	Guest Ellis Pretlow	Deathbed Planning for the Two Weeks Prior to Death	January 16, 2024
283	Guest Ellis Pretlow	Considerations for the Two Weeks Following Death	January 23, 2024
284	ACTEC Fellows Keith Bradoc Gallant and Julia B. Meister	Practical Considerations in Dealing With Incapacity	January 30, 2024
285	ACTEC Fellows Kim Kamin and Tara Anne Pleat	Tips for Dealing With and Drafting for Clients With Diminished Capacity	February 6, 2024
286	ACTEC Fellow Elizabeth A. Garlovsky	Navigating Unique Issues in Settlement of Trust and Estate Disputes	February 13, 2024
287	ACTEC Fellow Richard W. Nenno	A Trustee's Duty to Minimize State Income Tax	February 20, 2024
288	ACTEC Fellow Daniel Ebner	Conflicts of Interest in T&E Litigation	February 27, 2024
289	ACTEC Fellow Turney P. Berry	Client Restrictions on Charitable Gifts	March 5, 2024
290	ACTEC Fellow George D. Karibjanian	Tips for Preparing a Federal Estate Tax Return	March 12, 2024
291	ACTEC Fellow Professor Gerry W. Beyer	A Discussion of Ante-Mortem Probate	March 19, 2024
292	ACTEC Fellow Justin Miller	The New Normal for Charitable Tax Planning	March 26, 2024
293	ACTEC Fellow Kevin Matz	The IRS Ruling on Modifying a Grantor Trust	April 2, 2024
294	ACTEC Fellow Tracy M. Potts	What Is Artificial Intelligence and the Impact on T&E Law in 2024 and Beyond?	April 9, 2024
295	ACTEC Fellow Professor Gerry W. Beyer	The Ethical Use of Artificial Intelligence in Trust & Estate Law	April 16, 2024
296	ACTEC Fellow George L. Smith	AI-Related Practice Management Considerations for Law Firms	April 23, 2024
297	ACTEC Fellow Margaret Van Houten	Government Regulation of Artificial Intelligence	April 30, 2024
298	ACTEC Fellows Professors David O. Horton and Reid Kress Weisbord	The New Undue Influence	May 7, 2024
299	ACTEC Fellow Kelly M. Preteroti	Tips Regarding Fiduciary Disputes and Estate Planning	May 14, 2024
300	ACTEC Fellow Stephen R. Akers	Estate Planning in 2024	May 21, 2024
301	ACTEC Fellows Kim Kamin, Stephen Liss, and Christopher Siegle	Planning Ahead for Sunsetting of Tax Cuts and Jobs Act Exemptions	May 28, 2024
302	ACTEC Fellow Steven K. Mignogna	Deadly Claims in Trust and Estate Law	June 4, 2024
303	ACTEC Fellows Marsha Goodman and Tara Anne Pleat	Impact of the End of the COVID Public Health Emergency on Medicaid Renewals	June 11, 2024
304	ACTEC Fellow Turney P. Berry	The Virtues of Estate Planning & Estate Planners: Overview	June 18, 2024
305	ACTEC Fellow Turney P. Berry	The Virtues of Estate Planning & Estate Planners: Part 1 of 3 Estate Planning—A Job or a Calling?	June 25, 2024
306	ACTEC Fellow Turney P. Berry	The Virtues of Estate Planning & Estate Planners: Part 2 of 3 Estate Planning's Role in Civilization	July 2, 2024
307	ACTEC Fellow Turney P. Berry	The Virtues of Estate Planning & Estate Planners: Part 3 of 3 Essential Virtues of the Estate Planning Professional	July 9, 2024
308	ACTEC Fellows Margaret (Meg) G. Lodise and William (Bill) Thomas Hennessey III	The Ethics of Posting to Listservs	July 16, 2024

309	ACTEC Fellow Dana G. Fitzsimons Jr.	The NextGen Bar Exam Threat to Wills and Trusts	July 23, 2024
310	ACTEC Fellow Jill Choate Beier	FTC's Ban on Non-Compete Agreements	July 30, 2024
311	ACTEC Fellow Jeremiah W. Doyle IV	Charitable Deductions and Section 642(c)	August 6, 2024
312	ACTEC Fellows Jared R. Cloud and Charles W. Pieterse	Powers of Appointment Gone Wrong	August 13, 2024
313	ACTEC Fellow Christiana M. Lazo	Fiduciary Income Tax Planning for In-Kind Distributions and Specific Bequests	August 20, 2024
314	ACTEC Fellows Amanda K. DiChello and Steven K. Mignogna	Addressing Incomplete or Lost Records During Fiduciary Administration	August 27, 2024
315	ACTEC Fellows Professor Nancy A. McLaughlin and Jeffrey C. Thede	Restricted Charitable Gifts: Practical Suggestions	September 3, 2024
316	ACTEC Fellow Steven B. Gorin	Self-Employment Tax: Tax Court Curtails Limited Partner Exclusion	September 10, 2024
317	ACTEC Fellow Svetlana V. Bekman	Planning for the Young Under SECURE	September 17, 2024
318	ACTEC Fellow Steven B. Gorin	Modifying Trusts after CCA 202352018	September 24, 2024
319	ACTEC Fellow Daniel Hayward	Caution for Divorcing Spouses Who Are Trust Beneficiaries	October 1, 2024
320	ACTEC Fellow Steven B. Gorin	<i>Huffman</i> Case Endangers Buy-Sell Agreements	October 8, 2024
321	ACTEC Fellow Barry A. Nelson	Owner's Liability Following a Minor's Golf Cart Accident	October 15, 2024
322	ACTEC Fellow Steven B. Gorin	A Life Insurance-Funded Redemption Agreement Gone Bad	October 22, 2024
323	ACTEC Fellow Professor Gerry W. Beyer	Inserting Photos in Wills to Clarify Specific Gifts	October 29, 2024
324	ACTEC Fellow Lee M. Stautberg	Independent Contractor vs. Employee: In Tax vs. Labor Law	November 5, 2024
325	ACTEC Fellows David C. Blickenstaff, Philip C. Corbo, and Margaret E.W. Sager	Guiding Trust and Estate Disputes to Settlement	November 12, 2024
326	ACTEC Fellow Sandra Lynn Perkins	<i>The Power of Off: A Book Review</i>	November 19, 2024
327	ACTEC Fellow Mark R. Parthemer and Guest Jenny Johnson	Supreme Court Rulings Alter the Future of Tax Regulations	November 26, 2024
328	Guest Anita Ventrelli	Intersection of Family Law and Trusts and Estates	December 3, 2024
329	ACTEC Fellow Julia B. Meister and Guest Charles P. Golbert	Combatting Elder Financial Abuse	December 10, 2024
330	ACTEC Fellows Margaret G. Lodise, Ray Prather, and Eric W. Penzer	How Typical Trust Agreements Clauses Can Get Turned Around in the Real World	December 17, 2024
	CHRISTMAS AND NEW YEAR BREAK		
331	ACTEC Fellow Daniel S. Rubin	Use of Asset Protection Trusts for Estate Tax Planning Purposes	January 7, 2025
332	ACTEC Fellow Professor David M. English	The Uniform Trust Code Turns 25	January 14, 2025
333	ACTEC Fellow Shaina Kamen and Guest Kimberly A. Cook	Legal and Tax Considerations When Representing Influencers and Content Creators	January 21, 2025
334	ACTEC Fellows David E. Stutzman and Beth D. Tractenberg, and Guest Jan	Asset Protection for Art: Issues Arising in the Lifecycle of Acquisition to Disposition	January 28, 2025
335	ACTEC Fellows S. Gray Edmondson and George D. Karibjanian	Internal Affairs Doctrine, Asset Protection, and State of Formation for Legal Entities Pt. 1 of 2	February 4, 2025
336	ACTEC Fellows S. Gray Edmondson and George D. Karibjanian	Internal Affairs Doctrine, Asset Protection, and State of Formation for Legal Entities Pt. 2 of 2	February 11, 2025
337	ACTEC Fellow Jennifer B. Jordan McCall	Recent Trends in Estate and Gift Tax Law 2025, IRC 2036 and Related Tax Law	February 18, 2025

338	ACTEC Fellow Steven B. Gorin	Fiduciary Income Tax Planning: Strategies for Minimizing Income Tax on Trusts and Estates	February 25, 2025
339	ACTEC Fellow Natalie B. Choate	IRA Estate Planning Ideas to Discuss with Your Clients	March 4, 2025
340	ACTEC Fellow Steven B. Gorin	The Potential Impact of Proposed Amendments to Circular 230	March 11, 2025
341	ACTEC Fellow Lauren Wolven	Avoiding Common Ethical Traps in Estate Planning	
342	ACTEC Fellow S. Gray Edmondson	New 90-Day Deadline to Report Partnership Transactions	
343	ACTEC Fellow Todd Angkatavanich	Family-Owned Business and Internal Revenue Code Chapter 14 Pt 1 of 3	
344	ACTEC Fellow Todd Angkatavanich	Family-Owned Business and Internal Revenue Code Chapter 14 Pt 2 of 3	
345	ACTEC Fellow Todd Angkatavanich	Family-Owned Business and Internal Revenue Code Chapter 14 Pt 3 of 3	
346	ACTEC Fellow Professor Christopher R. Hoyt	Qualified Charitable Distributions (QCD) from IRAs	