

**American College of Trust and Estate Counsel
Practice Committee
LaQuinta Meeting - March 22, 2025
Agenda**

- I. Introductions and Administrative Matters - Hugh Magill, Chair
 - A. Welcome and Introductions
 - B. Committee Attendance
 - C. Committee Protocol
 - D. Review of ACTEC Code of Conduct
 - E. Acknowledgment of Sponsors' Support
 - F. Appreciation for ACTEC Staff

- II. Review of Minutes from Fall Meeting

- III. Practice Committee Mission

The Practice Committee strives to assist Fellows with their law practices and lives, both qualitatively and quantitatively. The Committee has four active subcommittees:

- Quality of Life
- Practice Management and Development
- Legacy and Non-Tax Planning
- Well Being

Subcommittee projects include developing state law and practice surveys for use by all Fellows, providing retirement planning considerations, and creating various checklists for us in practice management, estate planning, trust administration, and other areas. The Committee holds group roundtable discussions at each meeting on topics and trends affecting our practices and our quality of life.

- IV. Subcommittee Reports
 - A. Well-Being - Richard Franklin
 - B. Practice Management - Lee McElroy
 - C. Quality of Life - Jeff Defrancisco
 - D. Non-Tax Drafting - John Stroymeyer

- V. Special Presentation - Staff Development and Retention

Jill Miller, Jill Miller & Associates, PC
New York, New York

- VI. Subcommittee Breakout Sessions



ACTEC Executive Committee Liaison Report 2025 Annual Meeting

1. Thanks to the Program Committee chaired by [Stephanie Loomis-Price \(WA\)](#), all the Committee members, show-runners and speakers for an impactful line-up of [Professional Programs](#) (CLE) for this Annual Meeting.
2. The [L. Henry Gissel, Jr. Spirit of ACTEC Lecture](#) is Friday, March 21, 10:15 a.m. to 11:15 a.m., presented by Past President, [Ann B. Burns](#), examining the importance of collaborative relationships in our profession. Saturday's schedule features [The Annual Joseph Trachtman Memorial Lecture](#), 9:45 a.m. to 10:45 a.m., [Counting Down, Counting Up: Flourishing](#), presented by Past President [Stephen \(Steve\) R. Akers](#), exploring well-being and how estate planners can help clients and families thrive.
3. As ACTEC Fellows are aware, there is a current shortage of law school graduates pursuing careers in trust and estate law. On behalf of the College, President [Susan D. Snyder](#) has reached out to the directors of law school career centers in the U.S., with an invitation to arrange an ACTEC presentation for students about the exceptional career prospects in the trust and estate practice. This initiative is coordinated by the [Long Range Planning Committee](#).
4. Please take a moment to reach out and thank the [sponsors supporting this Annual Meeting](#). The sponsor display area is in the Flores Ballroom Foyer.
5. Following the conclusion of the Annual Meeting, a survey seeking feedback on your meeting experience including the program schedule, opportunities to network, tours, special events and the meeting venue will be sent to all attendees.

6. The [2025 Summer Meeting](#) is scheduled **June 18-22, Montreal, Quebec, Canada at the Le Centre Sheraton**. The Summer Meeting Schedule of Events will be available after the conclusion of the Annual Meeting.
7. The [2025 Fall Meeting](#) dates in Austin, TX have changed. New dates were announced in January and are **October 20-23, 2025**.
8. To be considered at the [2025 Fall Meeting](#) at the Fairmont Austin in Austin, TX, nominations must be received by the national office, ready to poll by these deadlines: Nominations for **International Fellows Monday, June 23, at 4:30 p.m. Eastern Time** and Nominations for **Fellows and Academic Fellows Monday, July 28, 4:30 p.m. Eastern Time**. Nominations received after these deadlines will be held over for the [2026 Annual Meeting](#) at the JW Marriott Water Street & Tampa Marriott Water Street in Tampa, FL.
9. See the [Meetings Announcements](#) sent each Monday for the list of upcoming National, State, Regional, and ACTEC Fellows Institute Meetings.
10. Keep up with the news, educational opportunities, webinars plus resources of the College and read the [Weekly Update](#) issued each Friday.

THE AMERICAN COLLEGE OF
TRUST AND ESTATE COUNSEL

ACTEC[®]

FOUNDATION

ACTEC Foundation Liaison Report 2025 Annual Meeting

1. The ACTEC Foundation welcomed the 10th Class of Dennis I. Belcher Young Leaders in September 2024. To date, fifteen former Young Leaders have been elected to the College through this Foundation grant-funded program of ACTEC's Diversity, Equity and Inclusivity Committee.
2. Stop by the Foundation's booth for a copy of The ACTEC Foundation's 2025 Annual Meeting Newsletter.
3. The Foundation-funded ACTEC Trust and Estate Talk Podcast has had over 633,000 total podcast downloads from 2018 to 2024.
4. The ACTEC Foundation website has a brand new look! Check it out, and get updates on the programs the Foundation supports and the stories of the people the Foundation has impacted: www.actecfoundation.org
5. [The 2025 Mary Moers Wenig Student Writing Competition](#) is now open. 2L and 3L students in ABA-accredited law schools should submit papers by June 30, 2025, and winners will be announced by July 15, 2025.
6. The Foundation is reviewing a new Mission Statement. Come to the Board of Directors meeting on Saturday, March 22 at 1:15 pm Pacific to hear the discussion. The Foundation will also be considering several interesting grant proposals.

Please support your ACTEC Foundation with a donation at
actecfoundation.org/DonateNow.

ACTEC Practice Committee Meeting
Chicago, Illinois
September 22, 2024
Minutes

- I. Introduction and Administrative Matters
 - A. Practice Committee Chair, Hugh Magill, welcomed members and guests to the meeting. Notwithstanding the timing of the meeting, over 50 members and visitors registered their attendance.
 - B. Magill reminded members that ACTEC by-laws require members to attend at least two meetings per year, and encouraged members to contact him if conflicts make compliance difficult.
 - C. Magill reminded Committee members to sign in on the meeting app.
 - D. Subcommittee meetings will occur later in the meeting, led by the following chairs:
 - 1. Well Being Richard Franklin
 - 2. Practice Management Lee McElroy
 - 3. Quality of Life Jeff DeFrancisco
 - 4. Non-Tax Planning John Strohmeier
 - E. Magill highlighted ACTEC's emphasis on discussions (as opposed to presentations) in both the Committee meeting and Sub-Committee meetings. Both members and visitors are encouraged to participate.
 - F. Magill encouraged attendees to express their appreciation to both sponsors and ACTEC staff, whose wonderful work facilitates the accomplishments of the entire College.
- II. Minutes
 - A. Minutes from the summer meeting (prepared by Randall Caldwell) were reviewed and accepted as presented.
- III. Special Presentation by Mark Harder and Marshall Peterson on representing lottery winners.
- IV. Sub-Committee Breakout Sessions

ACTEC 2024 Fall Meeting

Chicago, Illinois

Practice Committee

Sunday, September 22, 2024

10:30am - 1:00pm

	Chair	R. Hugh Magill
	EC Liaison	Jeffrey C. Thede
Member and Foundation Liaison		Stephanie Perry
	Member	Frank T. Adams
	Member	Leslie Kiefer Amann
	Member	Lisa Weinstein Burns
	Member	Randal B. Caldwell
	Member	Jeffrey C. De Francisco
	Member	Michael A. Dribin
	Member	Marissa Dungey
	Member	David J. Estes
	Member	Stanbery Foster Jr.
	Member	Jill R. Fowler
	Member	Richard S. Franklin
	Member	Elizabeth A. Garlovsky
	Member	Karen S. Gerstner
	Member	Bradley C. Grossenburg
	Member	Mark K. Harder
	Member	Louis S. Harrison
	Member	Nancy C. Hughes
	Member	Cristin C. Lambros
	Member	Jonathan P. Lee
	Member	Laird A. Lile
	Member	Robert Lee McElroy IV
	Member	Jonathan W. Michael
	Member	Louis Nostro
	Member	Eric W. Penzer
	Member	Sandra Lynn Perkins
	Member	Marshall H. Peterson
	Member	William H. Pokorny Jr.
	Member	Jennifer Lee Schooley
	Member	Susan B. Shields
	Member	Robert D. Steele
	Member	Julieanne E. Steinbacher
	Member	Mr. John Renway Strohmeyer
	Member	Scott A. Swain
	Member	Margaret Van Houten
	Member	Laura Christine Walker Plunkett
	Visitor	Elizabeth Carter

ACTEC 2024 Fall Meeting

Chicago, Illinois

Practice Committee

Visitor	Kirk Hoopingarner
Visitor	Kim Kamin
Visitor	Laura Mandel
Visitor	Raymond Odom
Visitor	Les Raatz
Visitor	Wendy Rusch
Visitor	Doyle Sanders