KnoxLaw INSTITUTE

PROFESSIONAL ADVISOR SYMPOSIUM

These courses are designed to help professionals identify legal issues in order to better serve their clients.

All courses are approved for 1.0 credit hour of continuing education for CPAs, CFPs, CTFAs and CLUs in Pennsylvania, Ohio and New York with exceptions noted below.

[+]Courses 7 and 9 are not approved for CTFA credit.

LIST OF SEMINARS

*** Keynote Address**

Eligible for 1.0 credit at both locations ("self-study" for CFPs in Cranberry Township).

1. Buying and Selling Intellectual Property: How What You Can't See Can Hurt You

Mark A. Denlinger and Joy E. Taylor

Explains the basics of patent, trademark, copyright and trade secret laws, and provides guidance on buying and selling intellectual property assets.

Offered at 1:30 p.m.

2. Spousal Lifetime Access Trusts (SLATs): Not Just for the Rich and Famous

Thomas C. Hoffman, II

Discusses "rainy day trusts" and why many spouses should consider nonreciprocal lifetime credit shelter trusts.

Offered at 1:30 p.m.

3. The New ERISA Fiduciary Rule: Don't Think You Are a Fiduciary? Think Again

David M. Mosier

Explores the new Department of Labor fiduciary regulations, including fiduciary investment advisor status, types of advisor compensation, covered and exempted communications, the impact on plan sponsors, and more.

Offered at 1:30 p.m.

LIST OF SEMINARS — CONTINUED

4. On the Grid: Energy Sector and Insolvency Issues in Today's Market

Guy C. Fustine and Jeremy T. Toman

In light of the current energy market, this program explores relevant issues for producers, landowners, trade creditors, potential buyers, and investors.

Offered at 2:45 p.m.

5. Probate (#*@$%!): Misconceptions, Pros and Cons

Jeffrey D. Scibetta

Explains the formal estate administration (probate) process and typical methods used to avoid it; discusses benefits, limitations and drawbacks of probate avoidance.

Offered at 2:45 p.m.

6. New IRS Valuation Discounts and Private Business Agreements: You, Your Partners, and the IRS

Nadia A. Havard

Provides working knowledge of new proposed regulations regarding valuation discounts and sections of the Bipartisan Budget Act of 2015 relating to partnership agreements, LLC agreements, buy-sell agreements, indemnifications, and changes to the partnership audit process, as applied to estate and business planning.

Offered at 2:45 p.m.

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7. Lending Decisions and Actions: The Trickle-Down Effect on Collections+

Mark G. Claypool and R. Perrin Baker

Explores how good or bad loan documentation has a significant impact on ultimate collectability of a loan. Learn how to improve the odds of collection in the event of a default.

Offered at 4 p.m.

8. "It Depends" — The Answer to All Simple Yes or No Questions

Jerome C. Wegley and Neal R. Devlin

Explores how even the simple aspects of business, financial and estate planning can be frustrated by facts, interpretation, and misunderstanding. Just when you thought you understood the law … life happens.

Offered at 4 p.m.

9. Business Contracts: I Read the Fine Print … So Should You+

Elliott J. Ehrenreich

Explains the perils and pitfalls of "boilerplate" terms and conditions attached to every business contract and how to address the associated issues.

Offered at 4 p.m.