



## CLASS III MASTER SCHEDULE

### ST. LOUIS SESSION III

#### HEART OF AMERICA FELLOWS INSTITUTE

##### **CHANCELLORS**

*Shannon K. Barks*

*Jeffery T. Peetz*

*Kathleen R. Sherby*

##### **DEANS**

*Theron (Terry) E. Fry*

*Lee Moore*

*Margaret Van Houten*

##### **LEADERSHIP TEAM**

*Shannon K. Barks*

*J. Lee Brown*

*Randal B. Caldwell*

*LeAnn Drummond Ellis*

*Theron (Terry) E. Fry*

*Hugh W. Gill*

*Lee Moore*

*Jeffery T. Peetz*

*Kathleen R. Sherby*

*Margaret Van Houten*

*Daniel J. Wintz*

#### **Hotel & Program Location:**

Le Meridien St. Louis Clayton

7730 Bonhomme Avenue, St. Louis, MO 63105

314-863-0400

Booking: [Heart of America Fellows Institute](https://www.heartofamerica.org)

Guests can also call the reservation line at 866-912-4016

and ask for the group rate of \$179.

*Reservations must be made by: **Tuesday, April 9, 2024***

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#### **Program 5**

**Thursday, May 9, 2024**

##### **Schedule:**

Light Breakfast: 9 a.m.

Program Begins: 9:45 a.m.

Lunch Provided

Program Ends: 5:55 p.m.

Dinner Reception: 6-7 p.m.

Graduation Dinner/Celebration: 7-9 p.m.

*Invitees: Program Participants, Program Chairs, Speakers, Chancellors, Deans, Senior Advisory Committee, ACTEC Fellows, Class I & II Graduates, and Sponsors*

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#### **Program 6**

**Friday, May 10, 2024**

##### **Schedule:**

Breakfast: 7 a.m.

Program Begins: 8 a.m.

Lunch Provided

Program Ends: 4:15 p.m.

Graduation Recognition: 4:15-4:45 p.m.

**DETAILED COURSE SCHEDULE – PROGRAM FIVE  
MAY 9, 2024, ST. LOUIS**

9:45-9:50 am	Welcome, <b>Kathy Sherby and Josh Weidemann</b>
9:50-11:20 am	Current Developments in Taxation, <b>Ron Aucutt and Steve Akers</b>
11:20- 11:30 am	Break
11:30 am– 12:20 pm	Building and Sustaining Trust and Estate Practice, <b>Institute Leadership</b>
12:20 - 1:10 pm	Lunch with ACTEC Fellows and Sponsors
1:10 - 2:40 pm	Conquering Subchapter K(ryptonite): Fundamentals of Partnership Taxation for Estate Planners, <b>Paul Lee</b>
2:40 – 2:50 pm	Break
2:50- 4:05 pm	Fiduciary Income Tax, <b>Janet Rae Montgomery</b>
4:05-4:15 pm	Break
4:15-5:05 pm	Gift Tax Topics: Returns, Adequate Disclosure and Client Communication, <b>Margaret Van Houten</b>
5:05- 5:55 pm	State Taxation, <b>Emily Kembell</b>

*Please note that attendance will be verified for each session.*



**DETAILED COURSE SCHEDULE – PROGRAM SIX  
MAY 10, 2024, ST. LOUIS**

8- 9 am	Estate Tax Returns, <b>George Karibjanian</b>
9- 10 am	Corporate Transparency Act, <b>Michael Breslow</b>
10- 10:15 am	Break
10:15-11:30 am	Tax Smart Charitable Gifts and Bequests with Retirement Assets, <b>Christopher Hoyt</b>
11:30 am - 12:30 pm	529 Plans, <b>Susan Bart</b>
12:30-1:30 pm	Lunch with ACTEC Fellows and Sponsors
1:30-2:45 pm	Generation Skipping Transfer Tax: Myths and Mysteries, <b>Beth Shapiro Kaufman</b>
2:45- 3 pm	Break
3- 4:15 pm	Defending Valuations on 706/709, <b>Stephanie Loomis-Price</b>

*Please note that attendance will be verified for each session.*

