

2025 ANNUAL MEETING

Preliminary Schedule of Events

La Quinta Resort & Club | La Quinta, CA | March 19–23

WEDNESDAY, MARCH 19

7:00 AM – 5:00 PM	ACTEC Registration & Sponsor Tables
8:00 AM – 12:00 PM	Executive Committee* (Breakfast)
9:00 AM – 5:00 PM	Membership Selection Committee* (Lunch)
1:00 PM – 3:30 PM	Employee Benefits Committee
1:00 PM – 3:30 PM	Program Committee*
1:00 PM – 3:30 PM	Tax Policy Study Committee
2:00 PM – 3:30 PM	Bylaws and Manuals Committee
3:30 PM – 5:00 PM	ACTEC/NCPJ Task Force*
3:30 PM – 6:00 PM	Business Planning Committee
3:30 PM – 6:00 PM	FATF Task Force
6:30 PM – 9:00 PM	2024-2025 Committee Members Reception & Dinner** <i>Northern Trust is pleased to sponsor</i>

THURSDAY, MARCH 20

7:00 AM – 5:00 PM	ACTEC Registration & Sponsor Tables
7:00 AM – 9:00 AM	Breakfast
8:00 AM – 9:30 AM	Seminars A & B
9:45 AM – 11:15 AM	Seminars C & D
11:30 AM – 1:00 PM	Executive Committee, Administrative & Substantive Chairs/Vice Chairs Meeting* (Lunch)
1:00 PM – 2:30 PM	State Chairs Steering Committee*
1:00 PM – 3:30 PM	Estate and Gift Tax Committee
1:00 PM – 3:30 PM	Nominating Committee*
3:30 PM – 6:00 PM	Charitable Planning Committee
3:30 PM – 6:00 PM	Digital Property Committee
3:30 PM – 6:00 PM	Fiduciary Litigation Committee
3:30 PM – 6:00 PM	Long Range Planning Committee*
5:45 PM – 6:30 PM	Sponsor Recognition Reception**
6:30 PM – 9:00 PM	President's Welcome Dinner <i>South Dakota Trust Company LLC is pleased to sponsor</i>

FRIDAY, MARCH 21

7:00 AM – 5:00 PM	ACTEC Registration & Sponsor Tables
7:00 AM – 9:00 AM	Opening Breakfast, Gavel Ceremony & Annual Business Meeting <i>Bessemer Trust is pleased to sponsor the Opening Breakfast</i>
8:30 AM – 10:00 AM	Symposium
9:00 AM – 10:00 AM	Books After Breakfast
10:15 AM – 11:15 AM	L. Henry Gissel, Jr. Spirit of ACTEC Lecture: Ann B. Burns
11:30 AM – 1:00 PM	Academic Membership Committee* (Lunch)
11:30 AM – 1:00 PM	Communications Committee (Lunch)
12:00 PM – 6:00 PM	Craig R. Webber Memorial Golf Tournament with Boxed Lunch
1:00 PM – 2:00 PM	Sponsorship Advisory Committee*
1:00 PM – 3:30 PM	Elder Law Committee
1:00 PM – 3:30 PM	International Estate Planning Committee
1:00 PM – 3:30 PM	Technology in the Practice Committee
1:00 PM – 5:00 PM	Tennis Tournament
2:00 PM – 3:30 PM	ULC Update and Discussion
2:00 PM – 2:50 PM	Audit Committee*
2:50 PM – 3:40 PM	Financial Management Committee*
3:40 PM – 4:30 PM	Joint Audit and Financial Management Committees*
3:30 PM – 6:00 PM	Fiduciary Administration Committee
3:30 PM – 6:00 PM	Professional Responsibility Committee
4:15 PM – 5:45 PM	New Fellows Steering Committee*
5:45 PM – 6:30 PM	New Fellows, International Fellows & First Time Attendees Reception**
	Dinner on own

*Committee meetings closed to visitors.

**RSVP during registration.
As of November 15, 2024

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SATURDAY, MARCH 22

6:30 AM – 7:45 AM	John L. Sullivan 5k Fun Run/Walk
7:00 AM – 5:00 PM	ACTEC Registration & Sponsor Tables
7:00 AM – 9:00 AM	Breakfast
8:00 AM – 9:30AM	Seminars E & F
8:30 AM – 9:30 AM	Spouse Program
9:45 AM – 10:45 AM	Annual Joseph Trachtman Lecture: Stephen R. Akers
11:00 AM – 1:15 PM	Family Law Task Force (Lunch)
11:00 AM – 1:15 PM	ACTEC Institutes Steering Committee* (Lunch)
11:00 AM – 1:15 PM	State Laws Committee (Lunch)
1:15 PM – 3:30 PM	ACTEC Foundation Board of Directors
1:15 PM – 3:30 PM	Asset Protection Committee
1:15 PM – 3:30 PM	Legal Education Committee
3:30 PM – 5:45 PM	Diversity, Equity and Inclusivity Committee
3:30 PM – 5:45 PM	Fiduciary Income Tax Committee
3:30 PM – 5:45 PM	Practice Committee
6:00 PM – 10:00 PM	Farewell Reception & Dinner <i>Christie's is pleased to sponsor</i>

SUNDAY, MARCH 23

7:00 AM – 11:30 AM	ACTEC Registration & Sponsor Tables
7:00 AM – 9:00 AM	Breakfast
8:00 AM – 9:30 AM	Hot Topics
9:45 AM – 11:15 AM	Seminars G & H
11:30 AM – 12:30 PM	State Chairs-Elect Orientation*
12:30 PM – 2:30 PM	State Chairs and State Chairs-Elect* (Lunch)
2:30 PM – 5:30 PM	Board of Regents Meeting
6:00 PM – 9:00 PM	Reception and Dinner for the Board of Regents, Regents-Elect, Past Presidents, State Chairs, Incoming State Chairs, and Spouses/Guests (by invitation) <i>Sotheby's is pleased to sponsor</i>

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As of November 15, 2024