

Mid-Atlantic Fellows Institute



of The American College of Trust and Estate Counsel

CLASS IV DETAILED SCHEDULE WILMINGTON SESSION I

MID-ATLANTIC FELLOWS INSTITUTE

CHANCELLORS

Margaret E.W. Sager

Lynn B. Sassin

Leonard J. Witman

DEANS

Hannah W. Mensch

Douglas L. Siegler

Gregory J. Weinig

SENIOR ADVISORY COMMITTEE

Charles S. Abell

Jocelyn Margolin Borowsky

Stacy Delich-Gould

Frederick R. Franke, Jr.

Daniel Hayward

Paul S. Lee

Steven K. Mignogna

Natalia Murphy

Anne J. O'Brien

Anita J. Siegel

Karen M. Stockmal

Sharon L. Wick

Hotel & Program Location:

Hyatt Place Wilmington/ Riverfront
760 Justison Street, Wilmington, DE 19801
302-803-5888

Booking: [Mid-Atlantic Fellows Institute](#)

Guests can also call the reservation line at 888-591-1234 and reference group code **GCMI1** for the group rate of \$209.

*Reservations must be made by: **Monday, September 16, 2024***

Program 1

Thursday, October 17, 2024

Schedule:

Breakfast: 8:30 a.m.

Program Begins: 9:30 a.m.

Lunch Provided

Program Ends: 4:45 p.m.

Reception: 5-7 p.m.

Invitees: Program Participants, Program Chairs, Speakers, Sponsors, Chancellors, Deans, Senior Advisory Committee, ACTEC Fellows and Class I - III Graduates

Program 2

Friday, October 18, 2024

Schedule:

Breakfast: 7:30 a.m.

Program Begins: 8:30 a.m.

Lunch Provided

Program Ends: 3:15 p.m.

**DETAILED COURSE SCHEDULE –PROGRAM ONE
THURSDAY, OCTOBER 17, 2024, WILMINGTON**

- 9:30-9:45 a.m. Welcome and Introduction to Mid-Atlantic Fellows Institute, **Chancellors**
- 9:45-10:45 a.m. The Use of Trusts, **Ronald D. Aucutt**
- 10:45-11 a.m. Break
- 11 a.m.- 12 p.m. QPRTs, GRATs and the Fundamentals of Sales to Grantor Trusts, **Kimberly Gill McKinnon**
- 12 -1 p.m. Lunch with ACTEC Fellows, Program Sponsors
- 1-2:15 p.m. Contested Jurisdictions, **Bradley D. Terebelo**
- 2:15-3:15 p.m. Slicing and Dicing the Trustee’s Roles and Obligations with Directed Trusts, **Michael M. Gordon**
- 3:15-3:30 p.m. Break
- 3:30-4:45 p.m. Corporate Transparency Act, **Jocelyn Margolin Borowsky**

Please note that attendance will be verified for each session.

Sincere thanks to our Session I Sponsors

Bonhams
AUCTIONEERS SINCE 1793

CAPITAL GROUP®
PRIVATE CLIENT SERVICES

BROWN BROTHERS HARRIMAN

fti Fiduciary Trust International

BRYN MAWR TRUST
COMPANY OF DELAWARE
A WSFS COMPANY

Sotheby’s EST. 1744

**DETAILED COURSE SCHEDULE –PROGRAM TWO
FRIDAY, OCTOBER 18, 2024, WILMINGTON**

- 8:30-8:45 a.m. Welcome, **Leonard J. Witman**
- 8:45-9:45 a.m. Lifetime Asset Transfers: An Overview, **Paul S. Lee**
- 9:45-10 a.m. Break
- 10 a.m.- 12 p.m. Conquering Subchapter K: Fundamentals of Partnership Taxation for Estate Planners, **Paul S. Lee**
- 12-1 p.m. Lunch with ACTEC Fellows, Program Sponsors
- 1-2:15 p.m. Navigating State Income Tax, **Richard W. Nenno**
- 2:15-3:15 p.m. ACTEC Mid-Atlantic State Chair Panel “I Bet You Didn’t Know!”
**William H. Lunger (DE), Douglas L. Siegler (D.C.),
John “Jack” Edgar (MD), Steven K. Mignogna (NJ),
Glenn G. Fox (Downstate NY), Mario Santilli, Jr. (PA)**

Please note that attendance will be verified for each session.

Sincere thanks to our Session I Sponsors

Bonhams
AUCTIONEERS SINCE 1793

CAPITAL GROUP®
PRIVATE CLIENT SERVICES

BROWN BROTHERS HARRIMAN

fti Fiduciary Trust International

BRYN MAWR TRUST
COMPANY OF DELAWARE
A WSFS COMPANY

Sotheby's EST. 1744