Siouxland Community Foundation

Advanced Estate Planning Seminar

Ethics, Asset Protection, and Philanthropy

June 5, 2025
8:00 AM – 12:05 PM

Time	Content	Objectives
8:00-8:25 AM	Registrant Check-In	
8:25-8:30 AM	Welcome, Introductions	• Welcome audience and introduce speakers • Logistics
8:30-9:15 AM	**Scope of Representation –** Don't be a Gambler, you got to know when to hold 'em, know when to fold 'em, know when to walk away, and know when to run. **by Kyle Irvin**	• Clarifying the Scope of Representation • Understanding Legal Duties and Liabilities • Adopting Best Practices for Estate Attorneys
9:15-10:00 AM	**Silence is Golden -** Attorney/Client Privilege Communications between Attorney and Personal Representative **by Kyle Irvin**	• Clarifying the Scope of Attorney/Client Privilege in Estate Administration • Examine the Fiduciary Exception to Attorney/Client Privilege. • Provide Practical Guidance for Estate Attorneys
10:00-11:00 AM	**Protecting Wealth -** Asset Protection Planning as Part of Estate Planning **by Mary Vandenack**	• Explain asset protection's role in estate planning. • Outline key asset protection tools (revocable trusts, irrevocable trusts, entity planning). • Explore domestic and international diversification in asset protection. • Highlight legal and ethical considerations in asset protection.
11:00-NOON	**Tax-Smart Giving –** Strategic Philanthropy for Practical Clients **by Mary Vandenack**	• Explore charitable giving vehicles. • Explain tax benefits of charitable strategies. • Outline regulatory issues (self-dealing, fiduciary duties). • Highlight legal and ethical considerations in charitable planning.
Noon-12:05	Closing Remarks	

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