

*30th Annual*  
ESTATE PLANNING INSTITUTE  
*Schedule of Presentations*  
**November 3 & 4, 2022**

**DAY 1: THURSDAY, NOVEMBER 3RD**

8:00-8:15am	Welcome: Diana Seward, Committee Member and Terra V. Winter, PhD, President and CEO, CFSNM
8:15-9:15am	Presentation 1: Gregory Martin- Consideration When Making Planned Gifts to Charity
9:15-10:15am	Presentation 2: Skyler Wildenstein - Property & Prudence: Managing Real Estate Held In Trust
10:15-10:30am	<b>BREAK</b>
10:30-11:30am	Presentation 3: Jane Gagne - Notable Estate Planning Disciplinary Cases (Ethics and Professionalism)
11:30-12:30pm	LUNCH - 30th Anniversary Celebration
12:30-1:30pm	Presentation 4: Anne Taylor - Overview of Disciplinary System and Rule 16-119 (Ethics and Professionalism)
1:30-2:30pm	Presentation 5: Jon Barela - China, Reshoring and the Borderplex
2:30-2:45pm	<b>BREAK</b>
2:45-3:45pm	Presentation 6: Chief Justice Bacon - The Continued Evolution of Adult Guardianship Proceedings in the State of New Mexico
3:45-4:45pm	Presentation 7: John Attwood - Selecting a Fiduciary... Let's Look Beyond the Fees
4:45-5:00pm	Closing Remarks: Patrick Grooms

**DAY 2: FRIDAY, NOVEMBER 4TH**

8:00-8:15am	Welcome: Josh Dwyer, Committee Member
8:15-9:15am	Presentation 8: Barak Wolff and Marykay Brady - Medical Aid in Dying: Our New Law and What It Means for Your Clients
9:15-9:30am	<b>BREAK</b>
9:30-11:00am	Presentation 9: Pete Davis - Washington Update 2022
11:00-12:00pm	Presentation 10: Gene Wolf - The Power to Appoint and Disappoint: Anatomy of Powers of Appointment
12:00-1:00pm	<b>NETWORKING LUNCH</b>
1:00-2:00pm	Presentation 11: Kenneth C. Leach - Designing the Best Vehicles To own and manage Real Estate?
2:00-2:15pm	<b>BREAK</b>
2:15-3:15pm	Presentation 12: Joseph A. Schremmer - Estate Planning Considerations for Oil and Gas Interests
3:15-4:15pm	Presentation 13: Alan Gluth - Ancillary Documents: Comprehensive Planning in a Non-Tax Environment
4:15-4:30pm	Closing Remarks by Terra Winter