

DETAILED COURSE SCHEDULE – PROGRAM TWO SEPTEMBER 29, 2023 – CHARLOTTE

8:30 – 8:45 a.m.	Introduction, J.P. Lee , Program Chair
8:45 – 9:45 a.m.	Gift Splitting, Diana S. C. Zeydel
9:45 – 10:00 a.m.	Break
10:00 – 11:00 am	Asset Protection Planning: Keeping Wealth in the Common- wealth, Avoiding Sticky Fingers in the Tar Heel State, or Volunteering for Trouble? (Part One), Bryan Howard, Holly Norvell and Katherine E. Ramsey
11:00 – 11:10 a.m.	Break
11:10 a.m. – 12:10 p.m.	Asset Protection Planning: Keeping Wealth in the Common- wealth, Avoiding Sticky Fingers in the Tar Heel State, or Volunteering for Trouble? (Part Two), Bryan Howard, Holly Norvell and Katherine E. Ramsey
12:10 – 1:20 p.m.	Lunch with ACTEC Fellows, Sponsors
1:20 – 2:50 p.m.	Retirement Benefits Planning After the SECURE Act, Larry H. Rocamora
2:50 – 3:00 p.m.	Break
3:00 – 4:00 p.m.	Planning for Nontraditional Families, Paula Kohut
4:00 – 4:30 p.m.	Q&A (<i>optional</i>)

Please note that attendance will be verified for each session.

