

2024 Graduate Texas Trust School ~ SMU Collins Executive Education Center

Monday, July 22	Tuesday, July 23	Wednesday, July 24	Thursday, July 25	Friday, July 26
8:30 – 9:30 a.m. Orientation @ SMU	8:00 – 10:15 a.m. Income Taxation of Estates and Trusts Alan Davis	8:00 – 10:00 a.m. Discretionary Distributions Leslie Kiefer Amann	8:00 – 10:00 a.m. Administration Pitfalls Dian Kauth	8:00 – 9:00 a.m. Insurance Concepts Yadira Anzueto
9:30 – 10:45 a.m. Fiduciary Litigation Sarah Patel Pacheco				
10:45 – 11:00 a.m. Break	10:15 – 10:30 a.m. Break	10:00 – 10:15 a.m. Break	10:00 – 10:15 a.m. Break	9:00 – 9:15 a.m. Break
11:00 a.m.– 12:30 p.m. Estate Administration Brandy Baxter-Thompson	10:30 a.m. - 11:45 a.m. Estate, Gift and Transfer Tax Mike Baldwin	10:15 a.m.– 12:00 p.m. Estate Planning II Matthew Rittmayer	10:15 – 11:45 a.m. Marital & Bypass Trusts John Round	9:15 – 10:15 a.m. OCC Regulatory Hot Buttons Ed Thomson
12:30 – 1:45 p.m. Lunch <small>(finish eating by 1:30)</small>	11:45 a.m. – 1:00 p.m. Lunch	12:00 – 1:15 p.m. Lunch	11:45 a.m. – 1:00 p.m. Lunch	10:15 – 11:15 a.m. Study Break
1:45 – 3:45 p.m. Elderly/Disability Issues and Medicaid, SSI & SSDI Elisa Dillard Rainey	1:00– 2:30 p.m. Generation Skipping Trust Mark Comuzzie	1:15 – 2:45 p.m. Ownership & Transfer Law Leslie Kiefer Amann	1:00 – 2:45 p.m. Tax Sensitive Investments Jeffrey Nelson	11:15 a.m. – 1:15 p.m. Final Exam
		2:45 – 4:15 p.m. Accounting for a Fiduciary Entity David Zahn		
3:45 – 4:15 p.m. Study Break	2:30 – 3:00 p.m. Study Break	4:15 – 4:45 p.m. Study Break	2:45 – 3:15 p.m. Study Break	
4:15 – 5:30 p.m. Powers of Attorney & Fiduciary Duties Brian Thomas	3:00 – 4:30 p.m. Building New Relationships Leslie Kiefer Amann & David Zahn	4:45 – 5:45 p.m. Advanced IRA Patrice Konarik	3:15 – 4:30 p.m. Economic & Market Overview Jeffrey Nelson	
			4:30 – 5:15 p.m. Alternative Investments Jeffrey Nelson	

Class Dinner Monday at 5:30pm @ SMU