

The Gulf Coast Estate Planning Conference

Agenda for Thursday, September 17, 2026

2026 Conference Chair: Sallie Byrd

7:30 – 8:15		REGISTRATION
8:15 – 9:15		ECONOMIC UPDATE <i>JOHN NORRIS – OAKWORTH CAPITAL BANK</i>
9:15 – 10:15		NAVIGATING SPECIAL NEEDS TRUSTS <i>JESSICA MILLING, JD, CTFA – FIRST HORIZON</i>
10:15 – 10:30		15 Minute Break
10:30 – 11:30		ANATOMY OF A DEAL GONE BAD: A LIVE ACTION CASE STUDY <i>VANESSA CLAIBORNE, CPA/ABV, ASA-BV, AEP & NENE GIANFALA, CPA/ABV, ASA-BV/IA – CHAFFE & ASSOC.</i>
11:30 – 1:00		LUNCH <i>LEE LAWSON – BALDWIN ALLIANCE</i> Award Recognition
1:00 – 2:00		RESPONSIBLE USE OF AI <i>GLENDA SNODGRASS, CISM, LCCA, ECoP® – THE NET EFFECT</i>
2:00 – 3:00		POSTMORTEM TAX PLANNING <i>ROBERT G. KELLER – KPMG, LLP</i>
3:00 – 3:10		10 Minute Break
3:10 – 4:10		THE “NEW” ALABAMA QUALIFIED DISPOSITIONS IN TRUST- DRAFTING A DOMESTIC ASSET PROTECTION TRUST FOR YOURSELF <i>J. ROBERT TURNIPSEED - ARMBRECHT JACKSON, LLP</i>
4:15		CLOSING REMARKS



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