

**DETAILED COURSE SCHEDULE – PROGRAM FOUR  
APRIL 29, 2022**

|                        |   |
|------------------------|---|
| 8:45-9 a.m.            | Welcome, <b>Barbara Wheaton</b>   |
| 9-10 a.m.              | Trust Investing, <b>Jeff Cooper</b>   |
| 10-11 a.m.             | Fiduciary Litigation, <b>Mark Swirbalus and Marshall Senterfitt</b>   |
| 11-11:15 a.m.          | Break   |
| 11:15 a.m. -12:15 p.m. | Income Tax Oddballs, <b>Ruth Mattson</b>  |
| 12:15-1:30 p.m.        | Lunch with ACTEC Fellows, Program Sponsors  |
| 1:30-2:30 p.m.         | Lifetime Asset Transfers, <b>Paul Lee</b>   |
| 2:30-2:35 p.m.         | Break   |
| 2:35-3:35 p.m.         | Review of State Estate Taxes in New England, and Recent Developments in Estate Planning, Trust and Estate Administration, <b>Sara Wells</b> |
| 3:35- 4:05 p.m.        | Debrief Social Break <i>(optional time for networking and socializing)</i>  |

*Please note that attendance will be verified for each session.*

**Sincere thanks to our Session Two Sponsors**

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