



Steve R. Akers
Bessemer Trust

Estate Planning Current Developments

This session examines a range of recent developments with an emphasis on their practical impact on planning for clients. The discussion includes legislative developments (Build Back Better Act, Corporate Transparency Act), regulatory and administrative guidance (anticipated SECURE Act proposed regulations, new life expectancy tables for retirement plan distributions, new life expectancy tables), general planning issues (including trust modifications), case law developments (including CCA 202152018 about GRATs, *Smaldino*, *Buck*, *Connelly*, *Hewitt*, and others), and a variety of other developments.

Steve R. Akers, JD, is a Managing Director with Bessemer Trust Company, N.A., in Dallas, Texas, where he is Senior Fiduciary Counsel and chairs the Estate Planning Committee.

Mr. Akers is a member of the Advisory Committee to the University of Miami Philip E. Heckerling Institute on Estate Planning and is a frequent speaker at that Institute, as well as other estate planning seminars across the country.

He is a Past President of the American College of Trust and Estate Counsel. He has previously served in a variety of roles with ACTEC including as a Regent, Chair of the Business Planning Committee, and Editor of the ACTEC Law Journal.

Mr. Akers is a past Chair of the American Bar Association's Section of Real Property, Trust & Estate Law, as well as of the State Bar of Texas Real Estate, Probate and Trust Law Section and of the Dallas Bar Probate, Trusts and Estates Section.

Mr. Akers has received the Distinguished Accredited Estate Planner Award from the National Association of Estate Planning Councils, the Distinguished Probate Lawyer Lifetime Achievement Award from the State Bar of Texas Real Estate, Probate and Trust Law Section, and the Lifetime Achievement Award from the Dallas Bar Association Probate, Trusts & Estates Section.

Mr. Akers received his B.S. degree in Chemical Engineering from Oklahoma State University (1974) and his J.D. degree from the University of Texas School of Law (1977).

Join us on Wednesday, March 16, 2022

4:00 PM – 4:30 PM Virtual Social Networking

4:30 PM – 6:00 PM Zoom Meeting

FREE for Preregistered Members - \$35 for Preregistered Guests

Virtual Meeting – Pre- Registration Required

Reservation needed by March 14, 2022

[Register Here](#)

MCLE: This activity is approved for MCLE credit of one hour by the State Bar of California & CFP®.

Excused Absence: Members can request an excused absence by mailing a letter, or sending an email (info@sfepc.org) to the Council Office prior to the meeting. Please address the letter to the Board of Directors.

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