YOU'RE INVITED TO THE 20TH ANNUAL

ESTATE & CHARITABLE GIFT PLANNING INSTITUTE

Estate and Charitable Planning in a new era:

Navigating the winding road

Presented by
Ann B. Burns and
Lawrence P. Katzenstein

Sponsored by: Monterey Trust Company and The Salvation Army, Monterey

September 19, 2012

An exclusive live broadcast

Hosted locally by:

Monterey Trust Company
The Salvation Army, Monterey
1491 Contra Costa Street
Seaside, California 93955
(Near the Embassy Suites on Canyon Del Rey)

Wednesday, September 19, 2012
7:30 a.m. to 1:30 p.m.
Registration Fee: $50 per person

Seating is limited, so register today.

To reserve your place

Call: 800-844-9677
Mail: Return coupon with payment

For additional information contact Art Stine
Email: art.stine@usw.salvationarmy.org

SPEAKERS

Ann B. Burns
Ann Burns is the Chair of the Trust, Estate and Charitable Planning group at Gray Plant Mooty. Her practice focuses on estate and charitable planning, business succession planning, estate and trust administration, and fiduciary and tax litigation.

Ann brings a unique mix of skills to her law practice as a certified public accountant and attorney. She represents multigenerational families of wealth throughout the country and individual and corporate trustees in estate planning and fiduciary matters.

Lawrence P. Katzenstein
Larry practices in the private client services area at Thompson Coburn, with a concentration on estate planning and charitable giving, and representation of exempt organizations. He is a nationally-known authority on estate planning and planned giving, and a frequent speaker around the country to professional groups.

He has been retained by the Internal Revenue Service to provide continuing legal education programs to Internal Revenue Service estate and gift tax attorneys. He appears annually on several American Bar Association-American Law Institute estate planning programs and has spoken at many other national tax institutes, including the Notre Dame Tax Institute, the University of Miami Heckerling Estate Planning Institute and the Southern Federal Tax Institute.

AGENDA

7:30 a.m. – 8:30 a.m.
Traveling the Winding Road of Ethical Considerations

Stay up to date on the developing state of the law in ethics in planning and estate administration. Understand the traps unwary advisors can fall into.

8:30 a.m. – 10:00 a.m.
2012 Recent Developments and Planning Opportunities

Understand the impact of current rulings and case law on planning techniques. Learn how to use the current $5.12 million exclusion amount to the best advantage.

- Forgiveness of loans
- Releases of interests and powers
- Clean up of life insurance trusts
- Dynasty and self-settled trusts

10:00 a.m. – 11:00 a.m. LITE BRUNCH

11:00 a.m. – 1:00 p.m.
A Potpourri of Charitable Planning Tricks and Traps

Charitable planning is an essential part of many estate plans. The rules are complex and often inconsistent. Increase your understanding of planning opportunities and pitfalls, new developments in charitable planning, and creative charitable planning techniques.

- What's new in divisions of charitable remainder trusts
- Marital deduction perils and opportunities
- Charitable planning in a time of low interest rates
- Tangible personal property gift tricks and traps
- Use of qualified contingencies in charitable trusts

1:00 p.m. to 1:30 p.m.
Discussion/Q & A

Who should attend?

Attorneys, CPAs, financial planners, certified life underwriters, investment advisors, bank trust officers, charitable gift planners, other estate planning professionals, and anyone interested in providing and protecting assets to help ensure the financial future of family, self and community.

Continuing education credits

MCLE, CPE, CFP® and CTFA continuing education credits are pending approval, including one hour of ethics. Credit hours vary from state to state. Please contact us for your state accreditation.

Please note: Insurance continuing education credits will not be available for this event.

Can't attend but wish to participate?

You may register to view the webcast as an individual or for your own group. Visit

www.thesalarmy.org/cont/ecgpipricing.htm

for more information and pricing.

F72835-6 7-2012
A02191-0612

☐ Yes - I will be attending the 20th Estate & Charitable Gift Planning Institute in Seaside on September 19, 2012.

☐ I will not be able to attend, but please invite me to any future seminars.

Name: ______________________ Number attending: ____________

Firm: ______________________ Amount enclosed: ____________

Address: ____

Phone Number: (______) ______________ E-mail: ______________

Return to: The Salvation Army, Office of Gift Planning, 832 Folsom Street, San Francisco, CA 94107 **Phone:** 800-944-9677

Please return before September 14, 2012