

## Sixth Annual Atlanta Estate Planning Forum



**Featured Speaker:**  
Natalie Choate

**Date:** Tuesday, November 3, 2009

**Time:** 12:30 p.m. - 5:00 p.m.

*Complimentary cocktail reception immediately following*

**Location:** The Cobb Energy Centre - Atlanta, Ga.

**CPE Credit:** 4.0 Hours

**CLE Credit:** 3.5 Hours

**Fee:** \$169 - Early Registration by October 7, 2009

**Sponsored by:**

Diversified Trust - Comprehensive Wealth Management

**Presented by:**

The Atlanta Bar Association Estate Planning and Probate Section  
and the Georgia Society of CPAs Estate and Financial Planning  
Section

[Click here](#) to register.

## Estate and Financial Planning Section Survey

In an effort to better understand your CPE needs, we are asking for your assistance by completing the survey below. The results will help us determine how well your needs as an Estate and Financial Planning Section member are being met, as well as how we can improve the types of CPE opportunities we provide to you.

This survey includes 7 questions and should take less than five minutes. We are asking that you complete the survey by 5:00 p.m. Wednesday, September 30, 2009.

[Click here](#) to complete the survey.

## The Age of Apprehension

During a recent consultation with a client focused on eldercare planning, he inquired: "At what age will my parents be willing to make some decisions about their long-term planning needs?" He had been frustrated for more than a year by what he perceived to be his parents' lack of willingness to address some emerging needs they have as a result of increasing health challenges that were placing them at risk. I assured my client that when they reach the "Age of Apprehension" they would begin to openly think about how to address their needs. [Read More...](#)

## Broken Home: Divorce and the Principal Residence

*David A. Stolz, CPA/PFS, CFP*

When Bill and Jen decided to divorce, they never expected their personal residence to become a major problem. Initially, Jen thought she wanted to stay in the house. She was emotionally attached to the home, and she thought remaining in it would help minimize the impact of the divorce on the couple's daughter, since the home was the only one their daughter had ever known. [Read More...](#)

## Transfer or Transition: What Is Your Inter-Generational Wealth Plan?

*Timothy J. Belber*

By their definitions, the difference between transfer and transition is very subtle. However, in action and result, the difference is anything but subtle. [Read More...](#)

## **What's the Big Investment Idea?**

Institutional investors should exploit big-picture investment themes, such as public policy, geopolitics, demographics and emerging wealth because they have been largely underestimated, according to Watson Wyatt. [Read More...](#)

## **Why Smart People Fail to Plan**

Most wealth creators hold dearly the dream that their wealth will be sustained for generations to come. Yet many people do not engage in the planning necessary to realize this dream. This is not news; estate planners and other advisors are well aware of this phenomenon. What is news is that a series of recent studies have identified this as a remarkably robust phenomenon among wealthy families. Despite differences in methodology, and in samples studied, these surveys reported notably similar results. [Read More...](#)

## **Mom, Apple Pie & Financial Education**

*David E. Adler*

If ever there was a teachable moment for financial educators, this is it. The market meltdown and intractable recession have most people more focused on their personal balance sheets than ever before, and they're full of intentions to improve. Luxury sales are on the down and out, as individuals try not to be. It's a great time to talk about money. [Read More...](#)

## **Why Traditional Estate Planning Fails**

*Lee Brower and Kenneth E. Guard*

Avoiding an estate planning failure requires the optimization of the family's core, experience, contribution and financial assets comprising "True Wealth." Traditional estate planning has done more to harm American families and diminish their wealth than the federal estate tax could ever do! [Read More...](#)

## **Upcoming CPE Courses**

### [Tax Issues Arising in a Depressed Economy](#)

Course No. 09010

Date: Friday, September 11, 2009

### [IRAs, Roth IRAs, SIMPLEs and SEPs: Cont. Rollovers, Dist.](#)

Course No. 09038

Date: Friday, September 25, 2009

### [Tax Aspects of Bankruptcy: All Need Not Be Lost](#)

Course No. 09042

Date: Monday, September 28, 2009

### [Tax Smart Financial Planning for Individuals under 40](#) (CFP)

Course No. 09046

Date: Tuesday, September 29, 2009