The Georgia Society *of* CPAs

Estate Planning Conference

July 30 - August 1, 2015 | Event Code: 13000

The Ritz-Carlton Lodge, Reynolds Plantation

Greensboro, Georgia

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The Ritz-Carlton Lodge, Reynolds Plantation, Greensboro, Georgia
16 hours of CPE credit | CFP®: 16 hours (applied for)
CLU: 16 hours (applied for) | CLE: 12.5 hours (applied for)

The Georgia Society of CPAs Estate Planning Conference is a unique event featuring sessions and updates led by national experts on the hottest topics in estate planning including foreign assets or beneficiaries, state taxation of trusts, special needs planning, and estate planning for non-traditional families.

Relax with a round of golf or at the cocktail reception in a family-friendly environment full of networking opportunities with your peers.

WHO SHOULD ATTEND: CPAs, financial advisors, and anyone looking to further their estate planning knowledge to best advise their clients.

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EXHIBITORS:

State Tax Credit Exchange
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For information on sponsorship opportunities with GSCPA, contact Andrew Lloyd at alloyd@gscpa.org or 404-504-2947

Thursday, July 30

7:30 - 8:30 a.m.
Registration and Continental Breakfast
Sponsored by Troutman Sanders LLP

8:30 - 8:35 a.m.
Welcome and Announcements

8:35 - 10:15 a.m.
A - Federal Estate Tax Update for Estate Planners
Samuel A. Donaldson, Esq., Georgia State University College of Law, Atlanta, Ga.
This entertaining and information-packed session will review significant federal income, estate, and gift tax cases, rulings, regulations, and legislation from 2014 and 2015 that are of interest to estate planning professionals.

10:15 - 10:30 a.m.
Break/Exhibits

10:30 - 11:45 a.m.
B - Estate Planning for Families Who Aren't the Cleavers
Shelly Nixon Donaldson, Esq.,
The Donaldson Law Firm, PC, Atlanta, Ga.
Craig Frankel, Esq., Gaslowitz Frankel LLC, Atlanta, Ga.
Learn what you can do to add value to your client offerings in this changing tax and family environment.

11:45 a.m. - 12:40 p.m.
Lunch

12:45 - 1:35 p.m.
C - Post Mortem Estate Planning
Mark Williamson, Esq., Alston & Bird, LLP, Atlanta, Ga.
Discuss the use of qualified disclaimers under the federal tax law and applicable local law to "improve" an estate plan when it is too late for the client to do so personally. The discussion will include time limits, requirements, special rules, traps for the unwary, and planning opportunities.

1:40 - 2:30 p.m.
D - Let My Trustees Go! Planning to Minimize or Avoid Georgia and Other State Income Taxes on Trusts
Richard Nenno, Esq., Wilmington Trust, Wilmington, Del.
Planning for state income taxes on trusts is a critical aspect of the estate-planning process. If done well, it can produce substantial benefits; if done poorly, it can produce substantial avoidable costs. Discuss how states handle tax trust income, with a focus on Georgia, and how to handle the issue for trusts and beneficiaries moving to and from Georgia.

3 p.m. Golf
Advanced registration required. Contact Lynne Carr at 404-504-2945.
Sponsored by Richard S. Hathaway, J.P. Morgan Securities

3 - 4:30 p.m. Bocce Ball
Sponsored by Jones and Kolb, CPAs

Friday, July 30

7:30 - 8 a.m.
Continental Breakfast *Sponsored by Troutman Sanders LLP*

8 - 9:15 a.m.
E - Planning for Beneficiaries with Special Needs
Kristen Lewis, Esq., Smith Gambrell & Russell, LLP, Atlanta, Ga.
This program will review the various types of Special Needs Trusts that serve as the cornerstone for securing the future of persons challenged by disabilities; the types of government benefits and programs that can be accessed and preserved with proper Special Needs Trust planning; the most common challenges (and solutions) encountered in Special Needs Trust planning; and an update on the status of "ABLE" accounts as another tool for Special Needs planning.

9:20 - 10:10 a.m.
F - An ABC Primer on Timber Taxation for Estate Planners Who Have Trouble Seeing the Forest and the Trees
Daniel McKeithen, Esq., Sutherland Asbill & Brennan LLP, Atlanta, Ga.
Don't be intimidated by the arcane timber industry jargon any longer. Discuss how to structure contracts to achieve capital gains under §631; basic depletion concepts; tax treatment of timber gains under FIRPTA and UBTI rules; and tax planning issues for timber REITs.

10:10 - 10:20 a.m.
Break/Exhibits

10:20 - 11:35 a.m.
G - We're Not in Kansas (or Georgia) Anymore! U.S. Estate Planning for Foreign Clients and Assets
Suzanne Plybon, Esq. and Jeremy Ware, Esq., Arnall Golden Gregory, Atlanta, Ga.
Cover how to deal with non-resident aliens moving into the U.S. or having U.S. beneficiaries; U.S. persons dealing with foreign assets, such as a vacation home in Canada; as well as foreign non-grantor trusts, the throw-back tax, and international estate tax treaties.

11:35 a.m. - 1 p.m.
Lunch *Sponsored by LivHome*
H - Economic Outlook (12 - 12:50 p.m.)
Galina Alexeenko, Federal Reserve Bank of Atlanta, Atlanta, Ga.
Review the basics of our economic outlook – continued growth, declining unemployment, and low inflation. Focus on the risks to that outlook: employment gains, policy uncertainties and potential problems offshore. There will be plenty of time available for Q&A.

1:05 - 2:20 p.m.
I - Paying for Long Term Care: Knowing and Using the Right Tools
Victoria Collier, Esq., The Elder Disability Law Firm of Victoria L. Collier PC, Decatur, Ga.
Examine a variety of senior care options to protect assets and pay for the high costs of long term care. Topics will include leveraging retirement accounts, Veteran's benefits, Medicaid benefits, and ensuring the appropriate language is put into estate planning documents. The presentation will provide the top tax questions clients and CPAs have as a result of elder care planning.

6 - 7 p.m.
Cocktail Reception
Sponsored by Menden Freiman, LLP

Saturday, August 1

7:30 - 8 a.m.
Continental Breakfast
Sponsored by Troutman Sanders LLP

8 - 9:15 a.m.
J - Estate vs. Income Tax Planning
Barbara Coats, CPA, PFS, Windham Brannon, PC, Atlanta, Ga.
Now that the federal estate tax exemption has increased and the top federal estate tax rate has decreased, income tax planning is likely to become more important to clients. Explore this new area of concern for estate planners.

9:15 - 9:30 a.m.
Break/ Exhibits

9:30 - 10:20 a.m.
K - Life Insurance 101 for Non-Insurance Advisors
Walt Helms, CFP®, Nease, Lagana, Eden & Culley, Atlanta, Ga.
Cover the basics of life insurance pricing including a discussion of the different types of policies available in today's market. Practical guidance will be provided allowing you to recognize opportunities and issues of concern when meeting with clients.

10:25 - 11:40 a.m.
L - Pulling it all Together
David F. Golden, Esq., CPA, Troutman Sanders LLP, Atlanta, Ga.
In this lively closing session, Mr. Golden will summarize the high points of each presenter from the program. He will tie together all of the sessions and help solidify what you have learned.

REGISTRATION

Event Code: 13000

Name | MI | Last | Member #

Company/Firm Name

Address

City | State | Zip

Phone | Fax | Email

Registration Confirmation: ❑ Mail ***OR*** ❑ Email

Check here if registration includes a change of address: ❑

PRICING INFORMATION

	Members	Nonmembers
Early Registration Fee by July 9	❑ $499	❑ $599
Standard Registration Fee	❑ $559	❑ $659
Late Registration Fee after July 27	❑ $599	❑ $699

Cancellation Policy: Cancellations/Transfers made up to three weeks before the seminar or conference will not incur an administration fee. Cancellations/Transfers made during the Standard Fee time frame are subject to a $50 administration fee. Cancellations/Transfers made within three business days are subject to a $100 administration fee for members; $150 for nonmembers. *Cancellations/No shows on the date of the event forfeit the entire registration fee. No refunds or transfers of course fee will be made after the date of the event.*

Turn Form Over for Payment Information

REGISTER TODAY!

CALL GSCPA CPE Department at 404-504-2985 or 800-330-8889, Opt. 3 to place a credit card order

FAX a completed registration form with credit card information to GSCPA at 404-237-1291

INTERNET registration available at www.gscpa.org

MAIL your completed registration with credit card information or check made payable to The Georgia Society of CPAs to:

The Georgia Society of CPAs
Six Concourse Parkway, Suite 800
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Choose how you wish to receive conference materials

Conference materials are available electronically as PDFs, making them easily viewed on your personal electronic device. Download the materials in advance and enjoy the convenience of going digital!

Participants who choose eMaterials will receive an email when the materials are ready to download, at least three days before the event. **For more information on eMaterials, visit: *ematerials.gscpa.org.***

- ❑ Download eMaterials — **No printed materials provided at the conference**
- ❑ Printed Materials — **Will receive printed materials at the conference**

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ITEMS TO NOTE

If you have a specific dietary or other need, please contact the CPE Department at least one week prior to the conference at 404-504-2985 or 800-330-8889, Opt. 3.

If you have special needs under the Americans with Disabilities Act, please attach a written description or call 404-504-2985 or 800-330-8889, Opt. 3.

Facility

The Ritz Carlton Lodge, Reynolds Plantation, Greensboro, Ga.
One Lake Oconee Trail | Greensboro, GA 30642
Main Telephone: 706-467-0600

Hotel

The Ritz Carlton Lodge, Reynolds Plantation, Greensboro, Ga.
One Lake Oconee Trail | Greensboro, GA 30642
Main Telephone: 706-467-0600
Room Rate: $213* | **Cut-off date:** June 29, 2015
**Can opt-out of $40 resort fee upon check-in*
Negotiated parking fee is $10 per night for GSCPA

To reserve a room online visit http://bit.ly/1ILiTyR
Call 1-800-944-5884 and mention GSCPA for your reservation.

Task Force

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