Estate Planning Conference

July 28-30, 2016

Event Code: 13000

The Ritz-Carlton Lodge

Reynolds Plantation

Greensboro, Georgia

The Georgia Society *of* CPAs

Estate Planning Conference

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The Ritz-Carlton Lodge, Reynolds Plantation, Greensboro, Georgia

16 hours of CPE credit | 16 hours CFP® credit (applied for)

16 hours CLU credit (applied for) | 12.5 hours CLE credit (applied for)

Spend three days in a resort environment getting in touch with the most recent news, changes and updates in estate planning. In addition to first-rate education, attendees will have the opportunity to network with peers in a relaxed setting. Tee times, Ritz-Kids Camp, bicycle, canoe, kayak rental and other resort activities can be reserved by attendees, and enjoy complimentary s'mores each evening by the lodge campfire.

Led by national experts in their respective fields, The Georgia Society of CPAs Annual Estate Planning Conference covers a wide variety of topics from the economy and tax issues, to succession planning and insurance. Each session is designed to maximize your understanding of estate planning concepts.

Who Should Attend: CPAs, financial advisors, attorneys, and other financial professionals looking to further their estate planning knowledge.

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EXHIBITORS:

State Tax Credit Exchange

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

Thursday, July 28

7:30 - 8:30 a.m.
Registration/Continental Breakfast

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

8:35 - 10:15 a.m.
A - Changing Laws and Evolving Trends
John J. Scroggin, J.D., LL.M, AEP
Scroggin & Company, PC, Roswell, Ga.
Tax and estate planning laws continue to evolve. Discuss some of the more significant recent legal changes, evolving trends in estate planning and some of the opportunities and traps that are created by this continuing changing environment. Designed to provide practical insights into how the changes impact your clients, including some of the unintended and unexpected consequences.

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

10:30 - 11:45 a.m.
B - 20 Small Fires Smoldering in Your Clients' Estate Planning and How to Extinguish Them Before It All Burns Down
Rebecca Cummings, J.D.
Rebecca Godbey Cummings, LLC, Atlanta, Ga.
Highlight problems that are lurking in your clients' estate plans. How families operate has evolved, but the boilerplate provisions in documents have not. Learn to identify issues commonly arising in estate administration and help your clients anticipate and resolve them now.

11:45 a.m. - 1:05 p.m.
Lunch
Sponsored by A Hand to Hold
C - The Economic Outlook and its Risks
Tom Cunningham, Ph.D., Metro Atlanta Chamber of Commerce, Atlanta, Ga.
Discuss a local and national outlook and discuss the risks – both positive and negative – to that view. Also in the discussion will be issues of price movements and the labor market.

1:10 - 2 p.m.
D - Protecting Elderly Clients from Financial Exploitation
Millie Baumbusch, J.D.
Gaslowicz Frankel, LLC, Atlanta, Ga.
One in five Americans over the age of 65 has been a victim of financial misconduct or exploitation by a criminal, financial service provider, opportunist, or family member. Discuss options to protect your clients, including powers of attorney, trusts, and conservatorships.

Friday, July 29

7:30 - 8 a.m.
Continental Breakfast

8 - 9:15 a.m.
E - Advanced Estate Tax Planning: The Crossroads of Tax Planning and Financial Engineering
Mark Parthemer, J.D., Bessemer Trust, Palm Beach, Fla.
Explore strategies to minimize estate, gift, GST and NIIT - and maybe even capital gains! "The avoidance of taxes is the only intellectual pursuit that still carries any reward," John Maynard Keynes.

9:20 - 10:35 a.m.
F - 709s/GST Allocations
Nikola R. Djuric, J.D., Sutherland, Atlanta, Ga.
Discuss issues relating to generation-skipping transfer tax when preparing Form 709, including when a return must be filed, reporting direct and indirect skips, automatic allocation of GST exemption, electing out of automatic allocation, notices of allocation, and gifts to trusts that qualify for the GST tax annual exclusion.

10:35 - 10:50 a.m.
Break/Exhibits

10:50 a.m. - 12:05 p.m.
G - Essential Charitable Giving
Chris Gabriel, CIMA®, Merrill Lynch, Pierce, Fenner & Smith, Atlanta, Ga.
Charitable giving is common to most successful families. Explore why clients give, how they give well, what the positive impact of giving is on them and those around them, and ways in which we can engage professionally in effective conversations about generosity.

12:05 - 1 p.m.
Lunch
Sponsored by A Hand to Hold

1:05 - 2:20 p.m.
H - Succession Planning: The Dos and Don'ts
James M. Harris, III, CFP®, CIMA®
Wells Fargo Advisors, LLC, Albany, Ga.
Many myths and concepts surround succession planning for the family owned business. Some business owners delay or dismiss the process because it seems overwhelming; yet, continuing harmony is very important. Review the importance of a successful succession plan in this informative, broad reaching session.

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

Saturday, July 30

7:30 - 8 a.m.
Continental Breakfast

8 - 9:15 a.m.
I - Hot Topics in IRS Estate Tax Litigation
Charles E. Hodges II, J.D., LL.M., Kilpatrick Townsend & Stockton LLP, Atlanta, Ga.
The IRS created the Global High Wealth Industry Group (GHW) to conduct audits of tax returns of high net worth individuals and their related businesses and entities. Recently, the IRS announced that more than 100 audits were on-going that involved the review of more than 500 returns. A GHW audit is generally more intrusive than a normal audit as the IRS uses specialists to look at the Forms 1040, 1041, 1065, 1120, 709, and 990s that are related to the wealthy individual. Discuss recent updates from the IRS on the GHW audits, as well as review a roadmap for preparing for and handling the intensive examination even during the planning stages.

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

9:30 - 10:45 a.m.
J - Dissecting a Trust Document
Rhett B. Zeigler, JD, GenSpring Family Offices, Atlanta, Ga.
David Miraldi, SunTrust Bank, Atlanta, Ga.
Dissect the various types of trusts a practitioner may encounter, focusing on identifying practical tips for interpreting and understanding this often complex and murky world. We will begin by identifying the elements of trusts, followed by a discussion of common trust provisions and why they are included in a document including revocability, income tax status, funding clauses, distributions, tax apportionments and more.

10:50 a.m. - 12:05 p.m.
K - Pulling it all Together
David F. Golden, Esq., CPA
Troutman Sanders LLP, Atlanta, Ga.
In this lively closing session, summarize the high points of each presenter, tying together all of the sessions and help solidify what you have learned over the three days.

REGISTRATION

Event Code: 13000

Name | MI | Last | Member #

Company/Firm Name

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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 13	❑ $499	❑ $599
Standard Registration Fee	❑ $559	❑ $659
Late Registration Fee after July 25	❑ $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.*

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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
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Choose how you wish to receive conference materials

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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

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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.

Hotel & Conference Facility

The Ritz Carlton Lodge, Reynolds Plantation, Greensboro, Ga.

One Lake Oconee Trail | Greensboro, GA 30642

Main Telephone: 706-467-0600

Room Rate: $219* | **Cut-off date:** Friday, July 1, 2016

**Can opt-out of $40 additional daily resort fee upon check-in*

Negotiated parking fee is $10 per night for GSCPA

To reserve a room online:
http://bitly.com/EP16Hotel
To call in your reservation: 1-800-944-5884
Please reference The Georgia Society of CPAs, when making reservations

Task Force

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