Estate Planning Conference

July 28-30, 2016
Event Code: 13000
The Ritz-Carlton Lodge
Reynolds Plantation
Greensboro, Georgia
Estate Planning Conference

July 28-30, 2016 | Event Code: 13000
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
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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.

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.

Friday, July 29

7:30 - 8 a.m.
Continental Breakfast

8 - 9:15 a.m.
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.
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

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.

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.

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

Sponsored by Menden Freiman, LLP
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.
PAYMENT INFORMATION

- Use Money on Account
- Check for $___________ made payable to The Georgia Society of CPAs
- Amount to charge credit card $___________
- Personal Card  OR  Company Card
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Signatures

PHOTOGRAPHY

By attending this event, you are demonstrating your permission to allow your photo to be taken and published in GSCPA marketing, promotional and web materials.

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.
**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**

**CHAIR**
Kenneth J. Jimenez, CPA, Jones and Kolb, CPAs, Atlanta, Ga.

**MEMBERS**
Lori Evers, CPA, CAP, Sandy Springs, Ga.
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