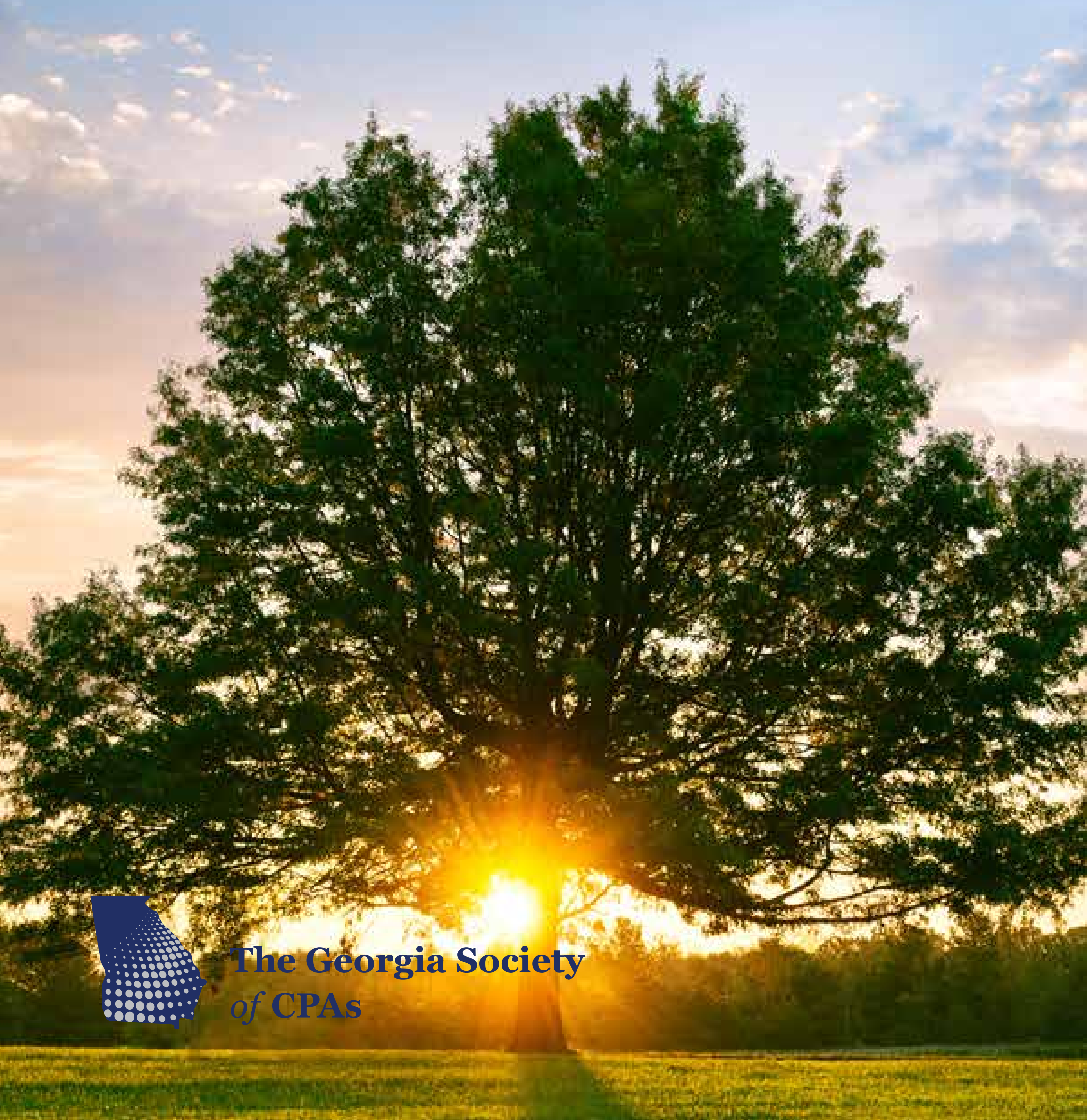
Estate Planning Conference

July 20-22, 2017

Event Code: 13000

The Ritz-Carlton Reynolds, Lake Oconee

Greensboro, Georgia



The Georgia Society *of* CPAs

Estate Planning Conference

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

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

16 hours CFTA 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 charitable giving 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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For information on sponsorship opportunities with GSCPA,
contact Elizabeth Cook at ecook@gscpa.org or 404-504-2941.

Thursday, July 20

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

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

8:35 - 10:15 a.m.
A - Recent Wealth Transfer Developments
Stephen R. Akers, Esq., Bessemer Trust, Dallas, Texas
Focus on practical implications for estate planning in an era of significant uncertainty over possible tax reform. Discussion includes IRS regulation projects, trust flexibility structuring, divorce concerns of beneficiaries, and attacks on "Wandry" clauses.

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

10:30 - 11:45 a.m.
B - The Ultimate Probate Checklist: From Dividing the China to Dealing with Digital Assets
Rebecca Cummings, Esq., Rebecca Godbey Cummings LLC, Atlanta, Ga.
Walk through the probate process in Georgia from death to the final discharge of the personal representative. Discuss best practices for a smooth administration, including tips for dealing with difficult family members, resolving common problems with Wills, and resources you can share with your clients.

11:45 a.m. - 1:05 p.m.
Lunch
Sponsored by A Hand to Hold
C - Economic Update: The Great Divide
Stephen Colivito, Asset Preservation Advisors, Atlanta, Ga.
Explore the ideological gap between the two parties in Washington. Discussion includes whether the parties can come together on any economic issues; how the Fed remains agnostic to the political pressures from each party while trying to help move the economy forward; the economic forecast if this type of animosity remains; and the biggest issue that both parties need to tackle regardless of who's in power.

1:10 - 2:25 p.m.
D - Basis Consistency Rules
Stephen R. Akers, Esq., Bessemer Trust, Dallas, Texas
The basic concept of the basis consistency legislation may seem simple, but the legislation can be unfair and imposes substantial reporting burdens on executors. Controversial issues in the proposed regulations and practical problems and concerns in completing the Form 8971 are addressed.

Friday, July 21

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

8 - 9:15 a.m.
E - Current Trends in Charitable Giving: Surprises from " The Light Side"
Shari Martin, Cobb Community Foundation, Atlanta, Ga.
Who gives? To whom do they give? How do they give? What, when, and most importantly, WHY do they give? Discuss the joys, disappointments and surprises experienced since recently crossing over to "The Light Side."

9:20 - 10:35 a.m.
F - Estate Freeze Techniques
Paige P. Baker, Esq., and James R. Kanner, Esq., Menden, Freiman, LLP, Atlanta, Ga.
Examine techniques designed to shift future appreciation in assets away from the current owner of those assets, thereby "freezing" the value of his or her estate for tax purposes and allowing the growth in value of those assets to pass to the client's intended beneficiaries without incurring additional estate tax.

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

10:50 a.m. - 12:05 p.m.

G - Insurance Decisions: It Comes Down to Alternatives

Gary T. Bottoms, CLU, ChFC, The Bottoms Group, Marietta, Ga.

After thousands of conversations over the years about insurance, some clear patterns emerge related to the concerns of our clients and the outcomes they want. Beyond how much and what kind, lies a desire to end well. That is, don't play a great game and "lose it on the last play." Discuss trends with life, disability, long term care, and health insurance.

12:05 - 1 p.m.

Lunch

Sponsored by A Hand to Hold

1:05 - 2:20 p.m.

H - Hot Tax Controversy Issues for the High Net Worth Taxpayer

Vivian D. Hoard, Esq. Taylor English Duma LLP, Atlanta, Ga.

With audits down, the IRS is focusing on program-type audit issues like conservation easements and offshore matters. Additional program audits include heightened scrutiny for offshore participants seeking streamlined relief as well as micro-captives. Auditors are urged to challenge purchase price allocations under the change in method of accounting rules. Non-program issues focus on challenging losses either based on the material participation rules or lack of business purpose.

Saturday, July 22

7:30 - 8 a.m.

Continental Breakfast

Sponsored by Troutman Sanders LLP

8 - 9:15 a.m.

I - Tricks and Traps for Trusts Holding Pass-Through Entities and Grantor Trust Issues

Steven B. Gorin, Esq., CPA, CGMA, Thompson Coburn LLP, St. Louis, Mo.

Discuss mismatches between ownership and tax distributions, multi-state entities, partnership basis step-up or step-down, creating business entities to generate superior fiduciary income tax results, mandatory income trusts holding partnership interests, S corporation grantor trust dangers, election deadlines for trusts owning S corporations, and the slippery grantor trust rules.

9:15 - 9:25 a.m.

Break/Exhibits

9:25 - 10:15 a.m.

J - Post Mortem Planning: Our Client Just Died Now What Do We Do

Jim McCarten, Esq., Burr & Forman, Atlanta, Ga.

Gain an understanding of how income tax and estate planning is affected once a client passes away. Focus on income tax issues that arise as a result of death, as well as how to fix an estate plan after death. Review steps to minimize income tax, how a tax problem can be fixed and what the IRA rules are. Forms 706, 709, 1041, Final 1040 issues, and elections will be covered.

10:20 - 11:35 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

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 June 29	❑ $555	❑ $655
Standard Registration Fee	❑ $615	❑ $715
Late Registration Fee after July 17	❑ $655	❑ $755

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

ONLINE 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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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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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 Reynolds, Lake Oconee, Greensboro, Ga.

One Lake Oconee Trail | Greensboro, GA 30642

Main Telephone: 706-467-0600

Room Rate: $225* | **Cut-off date:** Tuesday, June 21, 2017

**Can opt-out of $45 additional daily resort fee upon check-in*

Negotiated parking fee is $10 per night for GSCPA

To reserve a room online:
http://bit.ly/EP17Hotel
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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