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The Georgia Society of CPAs

Estate Planning Conference

July 25-27, 2019
Event Code: 13000
The Ritz-Carlton Reynolds, Lake Oconee
Greensboro, Georgia

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

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

Led by national experts, discussed at the local level, the Estate Planning Conference is designed for the unique needs of CPAs. Discuss a variety of topics, including modernizing Georgia's Trust code. Each session is designed to maximize your understanding of current estate planning developments. In addition to first-rate education, attendees will have the opportunity to network with peers throughout the three days.

Thursday, July 25

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

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

8:35 - 9:50 a.m.
A - Current Events Update for Estate Planning
Steve Siegel, The Siegel Group, Morristown, N.J.
Review current trends in estate planning, including what we should be telling our clients to do in 2019; flexible planning as a key consideration; basis remains a primary concern; and will the "Golden Age of Estate Planning" succumb to political risk after 2020?

9:50 - 10:05 a.m.
Networking Break

10:05 - 10:55 a.m.
B - Modernizing Georgia's Trust Code
Nikola "Nick" R. Djuric, Esq., The Bowden Spratt Law Firm, PC, Atlanta, Ga.
A discussion of the work of the Code Revision Committee and changes made to Georgia's Trust Code in 2018, including new provisions on modification, representation of beneficiaries, nonjudicial settlement agreements, decanting and trust directors, and a preview of more changes that may be coming in 2020.

10:55 - 11 a.m.
Networking Break

11 - 11:50 a.m.
C - Should You Serve as a Trustee Under the Revised Trust Code?
Craig Frankel, J.D., Gaslowitz Frankel LLC, Atlanta, Ga.
Discuss the pros and cons of CPAs serving as trustees and whether the Georgia Revised Trust Code provides trustees with more flexibility and less liability risk.

11:50 a.m. - 1:10 p.m.
Lunch

12:05 - 12:55 p.m.
D - The Economic Outlook and Its Risks
Tom Cunningham, Ph.D, Ethikos, Atlanta, Ga.
Examine the economic outlook, both nationally and regionally, and its risks. Particular attention will be paid to the factors shaping the forecast and what will happen if those factors do not behave.

1:10 - 2:25 p.m.
E - Retirement Plan Distributions: IRAs and Snafus
Steve Siegel, The Siegel Group, Morristown, NJ
Review the basic distribution rules – penalties and exceptions; minimum required distributions and the Qualified Charitable Distribution; the spousal rollover trap – and other mistakes to avoid; and proposed legislation, including The Retirement Savings Bill.

Friday, July 26

7:30 - 8 a.m.
Continental Breakfast

8 - 9:15 a.m.
F - Post Mortem Estate Planning
Russel Mobley, J.D., LL.M, Fulcher Hagler LLP, Augusta, Ga.
Post-mortem planning may be more complicated and valuable than ever before. Touch on a broad array of topics from estate administration decisions, income and estate tax planning, trust planning, managing business interests, and navigating options with retirement plans. Each estate is unique. Our guidance to clients should be customized to the assets, fiduciaries and beneficiaries of each estate.

9:15 - 9:20 a.m.
Break

9:20 - 10:35 a.m.
G - International Tax, New IRS Enforcement Efforts, and Key Issues for Estate Planners
Hale Sheppard, Esq., Chamberlain, Hrdlicka, White, Williams & Aughtry, Atlanta, Ga.
With a new Commissioner at the helm, IRS enforcement has reached its highest level in years. The IRS is now focused on expanded foreign asset reporting, new voluntary disclosure programs, implementation of FATCA weapons, compliance initiatives targeting foreign investors with U.S. rental property, new foreign-payment withholding procedures, repatriation, expatriation, unreported foreign gifts and inheritances, and more. Review the latest issues, cases, rulings and strategies in the international arena.

10:35 - 10:50 a.m.
Networking Break

10:50 a.m. - 12:05 p.m.
H - The Good, the Bad and the Ugly in the Tax World: Opportunity Zones, Conservation Easements and Micro-Captives
Ronald Levitt, J.D., LL.M and Gregory Rhodes, J.D., LL.M, Sirote, Birmingham, Ala.
Address the “good” through an overview of the opportunities provided under the Opportunity Zone Program (Sections 1400Z-1 and 1400Z -2). Review the “bad” through a description of recent developments and challenges for conservation and preservation easement deductions under Section 170(h). Look at the “ugly” developments in the micro-captive insurance area.

12:05 - 1 p.m.
Lunch

1:05 - 2:20 p.m.
I - Basis Planning
Lester Law, J.D., LL.M, Franklin Karibjanian & Law PLLC, Washington, D.C.
Discuss the basics of basis and some of the recent more sophisticated planning strategies to maximize basis (therefore minimizing taxable income). With the focus shifting to income tax issues for the estate planner, cover the rules and the latest ideas on basis planning, which include planning for the clients migrating from community property states (like Washington, Idaho and California) to non-community property states (like Oregon), as well as reviewing some of the more recent planning strategies to achieve basis adjustment, such as the use of the power of appointment support trust (POAST), and stepped-up basis trusts.

Saturday, July 27

7:30 - 8 a.m.
Continental Breakfast

8 - 9:15 a.m.
J - Evolutionary Planning Practice Ideas to Increase Happiness
Nancy C. Hughes, J.D., LL.M, Hughes & Scalise, Birmingham, Ala.
Review several estate planning techniques designed to make your clients happy and management techniques designed to make you happy.

9:15 - 9:25 a.m.
Break

9:25 - 10:15 a.m.
K - Planning for Today’s Family: Defining the Issues and Finding Solutions
J. Max Barger, J.D., AEP, PNC Wealth Management, Washington, D.C.
Amanda Priebe, CFP, PNC Wealth Management, Pittsburgh, Pa.
Two-thirds of American households are filled with families that do not look like the traditional nuclear family. However, our laws and traditional estate and financial planning strategies are based on social norms from the first half of the 20th century. Receive an overview of the legal and cultural hurdles facing these non-traditional families and examine how our estate and financial practices may address these unique issues our clients encounter.

10:15 - 10:20 a.m.
Break

10:20 - 11:35 a.m.
L - Pulling it all Together
David Golden, Esq., Troutman Sanders LLP, Atlanta, Ga.
In this lively closing session, summarize the high points of each presenter, tying together all 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 July 8	❑ $570	❑ $670
Standard Registration Fee	❑ $630	❑ $730
Late Registration Fee after July 22	❑ $670	❑ $770

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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Register Today!

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

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
Atlanta, GA 30328

Materials

The Estate Planning Conference is a paperless conference and all materials will be available electronically as PDFs. Materials will be available to download in advance and participants will receive an email when they are available. For more information on eMaterials visit ematerials.gscpa.org.

Participants 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.*

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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: $235*

Cut-off date: Tuesday, July 3, 2019

**Can opt-out of $53 additional daily resort fee upon check-in*

Negotiated parking fee is $13 per night for GSCPA

Book early as our group block fills up quickly

To reserve a room online:
http://bit.ly/EP19-Hotel
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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