ESTATE PLANNING 2010 FALL INSTITUTE

Thursday, November 18, 2010 in SALT LAKE CITY

SHERATON CITY CENTER HOTEL
150 WEST 500 SOUTH
SALT LAKE CITY, UT 84101

The 2010 FALL Institute is the 26th consecutive Institute sponsored by The Salt Lake Estate Planning Council. This year's Institute continues the tradition of bringing together nationally-respected experts, offering new and timely topics and providing a mix of formal presentations, panel discussions and question and answer sessions.

TOP-FLIGHT SESSIONS WITH:
All-Star, Nationally-Recognized Presenters – Timely Topics
Credits for CPE, CLE, CFP, CTFA, Insurance – Question & Answer Sessions

RECOMMENDED FOR:
Estate Planners, Attorneys, Accountants, Financial Advisors,
Trust Officers, Life Insurance Professionals

Sponsors

- ***Primary Children's Medical Center Foundation***
- ***Age Connections, Inc.***
- ***Guardian & Conservator Services, LLC***
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- ***Utah State Bar – Estate Planning Section***

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- **Support Financial Services**
- **University of Utah Development Office**
- **US Bank**
- **Utah Educational Savings Plan**

PROGRAM FACULTY

Featured Speaker

Samuel A. Donaldson Esq.

B.A. 1990, Oregon State University
J.D. 1993, University of Arizona
LL.M. 1994, University of Florida

Professor Donaldson teaches a number of tax and estate planning courses, as well as courses in the areas of property, commercial law and professional responsibility. He is a four-time recipient of the Philip A. Trautman Professor of the Year award from the School of Law's Student Bar Association. He is an Academic Fellow of the American College of Trust and Estate Counsel (ACTEC) and a member of the bar in Washington, Oregon, and Arizona.

Professor Donaldson is the author of the Thomson-West casebook, *Federal Income Taxation of Individuals*, a co-author of the *Price on Contemporary Estate Planning* treatise published by CCH, and a co-author of *Federal Wealth Transfer Taxes*, a reference published by Thomson-West. Professor Donaldson has served as the Harry R. Horrow Visiting Professor of International Law at Northwestern University and a Visiting Assistant Professor at the University of Florida Levin College of Law. An amateur crossword constructor, his puzzles have been published in *The New York Times*, *The Los Angeles Times*, *The Chronicle of Higher Education*, and *USA Today*.

Luncheon Speaker

Patrick Kuhse, CFP, International Speaker, Trainer & Consultant on Business Ethics
Patrick Kuhse is one of the most in-demand speakers on business ethics and critical thinking skills in America today.

Afternoon Presenters

Brad Bauer, J.D., Notre Dame, Northwestern Mutual Financial Network, Advanced Planning Division, Director

Craig Standing, Past President SLEPC, Bank of Utah

Cynthia Crass, Esq., Past President SLEPC, Callister Nebeker & McCullough

Kimberly Ford, Trust Officer, US Bank

Lisa Mariano, Vice President and Trust Officer, Key Private Bank

Tammy Richards, Vice President and Trust Officer, Well Fargo Bank

Thomas Christensen, Esq., Past President SLEPC, Blackburn & Stoll

Becky Allred, Karren, Hendrix, Stagg Allen & Company

Margy Campbell, LCSW, Age Connections, Inc.

Niki Wolfe, Investigator II, Adult Protective Services

Fred D. Essig, Esq., Dixon & Essig

ABOUT THE SALT LAKE ESTATE PLANNING COUNCIL

The Salt Lake Estate Planning Council is an interdisciplinary association of professionals who practice estate planning. The constituent professional groups included in the Council are attorneys, Certified Public Accountants, Chartered Life Underwriters, Certified Financial Planners, and Trust Officers. The Council meets monthly to consider estate planning topics of interest.

SALT LAKE ESTATE PLANNING COUNCIL

2010 FALL INSTITUTE AGENDA

Sheraton Salt Lake City

Thursday, November 18, 2010

8:00 a.m. to 8:30 a.m. – Registration and Continental Breakfast *(Fresh fruit, baked goods, juice, coffee, tea)*

Morning Session

8:30 a.m. – 8:45 a.m.	Welcome
8:45 a.m. – 10:00 a.m.	Samuel A. Donaldson, Perkins Coie, LLP ***Federal Tax Update***
10:00 a.m. – 11:00 a.m.	Samuel A. Donaldson ***Income Tax Aspects of FLPs and FLCs***
11:00 a.m. – 11:15 a.m.	**BREAK** *(Coffee, tea, soda, bottled water)*
11:15 a.m. – 12:15 p.m.	Samuel A. Donaldson ***Burning Questions (and Even Hotter Answers) About Grantor Trusts***
12:15 p.m. – 1:30 p.m.	**LUNCH** Patrick Kuhse, ***From Prominence to Prison: Why Smart People Do Dumb Things*** *Lunch Menu: Classic Caesar Salad, Stuffed Chicken Tuscany, Chocolate Mousse Cake*

Afternoon Session	**Session**	
1:40 p.m. – 2:30 p.m.	***1***	Samuel A. Donaldson ***What Estate Planners Should Know About "S" Corporations***
	2	Brad Bauer, Northwestern Mutual Financial Network ***Estate Planning with Split Dollar: Finally! An Understandable Practical Treatment***
1:30 p.m. – 2:30 p.m.	***3***	Patrick Kuhse ***From Prominence to Prison: Why Smart People Do Dumb Things (Part 2)***
2:40 p.m. – 3:30 p.m.	***1***	Craig Standing, Cynthia Crass, Kimberly Ford, Lisa Mariano, Tammy Richards ***How Your Trust Provisions Are Interpreted!***
	2	Brad Bauer ***The Flexible Irrevocable Trust: Seeing the Opportunities and Resolving the Issues***
3:30 p.m. – 3:45 p.m.		**BREAK** *(Cookies & brownies, milk, soda, bottled water)*
3:45 p.m. – 4:35 p.m.	***1***	Thomas Christensen, Becky Allred, Margy M. Campbell, Niki Wolfe ***Protecting the Elderly from Financial Abuse***
	2	Fred D. Essig, Dixon & Essig ***When to Advise Clients to Review Their Estate Plan***

GENERAL REGISTRATION INFORMATION

Early Bird Discount and Tuition

Register before November 10, 2010 and save $20; pay only $120 instead of $140 for members and $150 instead of $170 for non-members. Registration includes copy of all materials, lunch and refreshment breaks.

Cancellation Policy

Cancellation is received on or before Friday, November 11, will receive a full refund, less a $40 administrative charge.

Continuing Education Credit

CLE credit for members of the Utah State Bar; members of other states bar associations are encouraged to call regarding CLE approval in their states. CPA, CLU and CTFA credit to be determined.

Course Materials

Available for $50.00 plus $5.00 S/H. Please allow 4-6 weeks for delivery.

Confirmation notices will **not** be mailed. When registration is received, registration will be placed on Institute attendance list.

Acceptable Forms of Payment

Payment by check, Visa or MasterCard. Credit card payments incur a $10 handling fee.

Seminar Location

Sheraton Hotel, Salt Lake City
150 West 500 South
Salt Lake City, UT 84101

ESTATE PLANNING 2010 FALL INSTITUTE

S L E P C

Registration Form

I will attend Estate Planning 2010 Fall Institute November 18, 2010:

- ☐ **Member: $120.00 "Early Bird" (By November 10, 2010)**
- ☐ **Non-Member “Early Bird” $150.00 (By November 10, 2010)**
- ☐ **Member $140 (After November 10, 2010)**
- ☐ **Non-Member $170 (After November 10, 2010)**
- ☐ **I cannot attend, but please send me course materials at $50.00/set plus $5.00 S&H**

I plan to attend the following break-out sessions:

First Break-Out (1:40 p.m. - 2:30 p.m.)

- ☐ ***Session 1:*** Samuel A. Donaldson “*What Estate Planners Should Know About “S” Corporations”*
- ☐ ***Session 2:*** Brad Bauer “*Estate Planning with Split Dollar: Finally! An Understandable Practical Treatment”*
- ☐ ***Session 3:*** Patrick Kuhse “*From Prominence to Prison: Why Smart People Do Dumb Things (Part 2)”*

Second Break-Out (2:40 p.m. - 3:30 p.m.)

- ☐ ***Session 1:*** Craig Standing “*How Your Trust Provisions Are Interpreted!”*
- ☐ ***Session 2:*** Brad Bauer “*Financing Life Insurance in an Estate Planning Environment”*

Third Break-Out (3:45 p.m. - 4:35 p.m.)

- ☐ ***Session 1:*** Thomas Christensen “*Protecting the Elderly from Financial Abuse”*
- ☐ ***Session 2:*** Fred D. Essig “*When to Advise Clients to Review Their Estate Plan”*

As an alternative to the luncheon menu, I would like:

☐ **A vegetarian meal OR** ☐ **A gluten-free meal.**

Registrant (1): ______________________________ **Registrant (3):** ______________________________

Registrant (2): ______________________________ **Registrant (4):** ______________________________

Note: If registering for more than one person, please include the name of each person on the application or check stub.

Payment Information

Please make checks payable to *“**The Salt Lake Estate Planning Council**.”* Enter credit card information below.

CREDIT CARD PAYMENT INFORMATION
(VISA and MasterCard ONLY)

Firm: ______________________ Card Number: __________________ CID#_______ Exp. Date ____________

Authorized Signature: ______________________________________ Phone # __________________________

Billing Address: ___________________________ City: ____________ State: _______ Zip: _________ (No P.O.)

Note: Each transaction will be charged a $10 handling fee. Transactions are processed through “Trustconsult” (the name that will appear on your credit card statement).

Transmission of Registration Form

BY FAX: (888) 560-4343

BY MAIL: The Salt Lake Estate Planning Council
1338 North 1270 East
American Fork, UT 84003