By: Martin M. Shenkman, CPA, MBA, AEP, PFS, JD

Planning Ideas that Will Change How You Practice Estate Planning

Free 1 hour Seminar for attorneys, CPAs, financial advisers, and insurance consultants followed by Q&A session. CLE credits for some locations. NO SOLICITATIONS.

Tax law changes, aging clients, new planning techniques, financial forecasting, and more, are transforming the practice of estate planning. Creative and practical suggestions will be offered for how practitioners in all specialties can thrive in this evolving environment. The discussion will include ideas on how planning will become more dependent on investment strategies. Planning strategies to address aging clients, evolving laws, and the growing importance of financial forecasting to the estate planning process include:

- Why and how the role of estate planner is evolving from estate tax planner to estate counselor and what the practical implications of this are.
- A new model for gift planning for moderate to ultra-wealthy clients. How gift provisions in durable powers of attorney should be different than in the past.
- A different approach to planning and drafting revocable trusts to protect aging clients.
- How to use financial forecasting to better plan estates, including applications of non-reciprocal Spousal Lifetime Access Trusts (SLATs).
- Recent tax and legal developments that affect planning.
- Other practical and creative planning ideas for clients of all wealth levels.

Washington DC **Wednesday | July 6, 2016** 12noon Lunch Presentation*	**Raleigh, NC** **Tuesday | July 12, 2016** 8:30 am Breakfast Presentation*	**Greensboro, NC** **Wednesday | July 13, 2016** 6:00 pm Dinner Presentation*
Charlotte, NC **Friday | July 15, 2016** 12noon Lunch Presentation*	**Atlanta, GA** **Tuesday | July 19, 2016** 12noon Lunch Presentation*	*See Reverse for Full Location Details

Professional Education Credits: The National Academy of Continuing Legal Education, NACLE, will endeavor to provide CLE credits in AZ, CA, IL, NJ, NY, NV, PA, TN and VA. NACLE will help attorneys self-submit to CO, GA, FL and NC. For specific CLE credit questions please contact 866-466-2253 Ext. 110. No other professional credits will be provided. Your licensing jurisdiction has final authority on all mandatory continuing education requirements.

Disclaimer: Neither the American Cancer Society nor Wilmington Trust, N.A. are responsible for the contents of the presentation or the lecture materials to be distributed.

Washington DC | Wednesday, July 6, 2016 | Noon Lunch presentation
Location Wilmington Trust, N.A., 1350 I Street, NW, Lower Level Conference Room, Washington, DC 20005
Registration/Information Judie Shepherd-Martin ACS, Senior Director for Planned and Major Gifts for DC, Northern Virginia, Patricia Castaldo Director, Estate & Gift Planning
American Cancer Society, Inc. Email: patricia.castaldo@cancer.org

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Raleigh, NC | Tuesday, July 12, 2016 | 8:30 am Breakfast presentation
Location American Cancer Society, Inc. 8300 Health Park Suite 10, Raleigh, NC 27615
Registration/Information Jamie Knowles-Griffiths, MPA, Director, Estate and Gift Planning
American Cancer Society, Inc. 919.334.5243 Email: jamie.knowles-griffiths@cancer.org

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Greensboro, NC | Wednesday, July 13, 2016 | 6:00 pm Dinner presentation
Location First Lutheran Church, 3600 W. Friendly Ave., Greensboro, NC 27410
Registration/Information Troy Thee, Director, Estate and Gift Planning
American Cancer Society, Inc. 336.834.3354 Email: troy.thee@cancer.org

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Charlotte, NC | Friday, July 15, 2016 | Noon Lunch presentation
Location 1901 Brunswick Ave Suite 100, Charlotte, NC 28207
Registration/Information Troy Thee, Director, Estate and Gift Planning
American Cancer Society, Inc. 828-234-0921 Email: troy.thee@cancer.org

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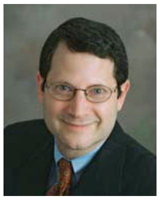
Atlanta, GA | Tuesday, July 19, 2016 | Noon Lunch presentation
Location Wilmington Trust, N.A. Offices 3280 Peachtree Road NE, Terminus, 27th Floor, Atlanta, GA 30305
Registration/Information John Stewart, Sr. Director, Estate and Gift Planning
American Cancer Society, Inc. 334-498-6567



Presentation by:
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Shenkman

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