ESTATE PLANNERS DAY

QUEENS UNIVERSITY *of* CHARLOTTE

Thursday, May 16, 2019 | 7:15 AM – 6:30 PM

Queens University of Charlotte | Levine Center for Health and Recreation

Queens University of Charlotte is pleased to offer the 41st Annual Estate Planners Day. This single day conference offers a comprehensive educational program for estate planning professionals. Nationally recognized experts will provide recent federal and state law updates and will cover timely and relevant topics in the fields of estate, tax, accounting, insurance, financial and charitable planning. Estate Planners Day is the longest continually running public event in Queens' history.

WHO SHOULD ATTEND:

- Accountants
- Asset Managers
- Attorneys
- Financial Advisors
- Financial Planning Practitioners
- Insurance Professionals
- Philanthropy Professionals
- Trust Officers

Program is pending CFP, N.C. Insurance, CPE, PACE, N.C. & S.C. CLE, and CTFA continuing education credit approval.

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queens.edu/estate-planning

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Conference Agenda*

7:15 - 8:00 AM | Registration & Breakfast

8:00 - 8:05 AM | Welcome Remarks

8:05 - 9:30 AM | Session 1
North Carolina Update
Janice Davies, *Attorney, Davies Law PLLC*
Federal Update
Jeff Ricchetti, *President, Ricchetti, Inc.*

9:30 - 9:50 AM | Break

9:50 - 10:45 AM | Session 2
A Brief History of Family Limited Partnerships and Section 2036
Todd Angkatavanich, *Principal, Private Client Services, National Tax Development, EY*

10:45 - 11:45 AM | Session 3
Putting It On & Taking It Off: Managing Tax Basis Today (For Tomorrow)
Paul Lee, *Global Fiduciary Strategist, Senior Vice President, Managing Director, Northern Trust*

11:45 AM - 12:45 PM | Lunch

12:45 - 1:45 PM | Session 4
Economic Update
Joe Seydl, *Capital Markets Economist, Vice President, J.P. Morgan Private Bank*

1:45 - 2:40 PM | Session 5
How Do You Reflect Family Values in an Estate Plan
Beth Shapiro Kaufman, *Member, Caplin & Drysdale*

2:40 - 3:00 PM | Break

3:00 - 4:00 PM | Session 6
Unwinding an Unworkable Transaction with a Workable Policy
Mary Ann Mancini, *Partner, Loeb & Loeb*

4:00 - 5:00 PM | Session 7
Planning For Beneficiaries With Special Needs
Kristen Lewis, *Attorney, Smith, Gambrell & Russell, LLP*

5:00 - 6:30 PM | Reception

**Subject to change.*

REGISTER TODAY

TO LEARN MORE OR REGISTER VISIT:
queens.edu/estate-planning

PRICING:
$260 Early Bird (through April 18)
$290 Regular (after April 18)
$240 New Attendee

Previous Attendees - Refer one or more new attendees and receive a $50 gift card (new attendee must include your name when registering)

$15 discount for Charlotte Estate Planning Council Members

$25 Binder Fee for hard copy of materials

CONTACT:
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