

55th Annual Estate Planning Short Course



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\$100 Discount Program for CEPC Members

April 26 - 27, 2012 - Live On-Site - Hyatt Regency McCormick Place, Chicago

May 17 - 18, 2012 - Live On-Site - Hilton Garden Inn, Champaign

May 17 - 18, 2012 - Livecast - The Professional Education Center at IICLE® Headquarters, Springfield

May 17 - 18, 2012 - Webcast - Available via the Internet from the convenience of your computer.

12.25 MCLE Credit Hours including 1 PMCLE credit hour pending approval

Underwriting Partners



**TO ORDER RETURN THIS ORDER FORM OR CALL 1-800-252-8062
AND USE COUPON CODE CEPC2012.**

Note: CE for Insurance does not apply to the live webcast attendance option.

Discount exclusively for Chicago Estate Planning Council Members. Cannot be combined with Season Pass Discount, Early Bird Registration Discount, or any other discount. No other discounts apply.

Visit www.iicle.com for more information on all-new special features for this course.

REGISTRATION

55TH ANNUAL ESTATE PLANNING SHORT COURSE

APRIL 26-27, 2012 - LIVE ON-SITE

Hyatt Regency McCormick Place, Chicago (C2008-01)

CEPC Member Tuition \$499 Regular Tuition \$599

MAY 17-18, 2012 - LIVE ON-SITE

Hilton Garden Inn, Champaign (C2008-02)

CEPC Member Tuition \$499 Regular Tuition \$599

MAY 17-18, 2012 - LIVECAST

The Professional Education Center
at IICLE® Headquarters, Springfield (C2008-03)

CEPC Member Tuition \$449 Regular Tuition \$549

MAY 17-18, 2012 - WEBCAST

Available via the Internet from the convenience
of your computer. (C2008-04)

CEPC Member Tuition \$449 Regular Tuition \$549

I CAN'T ATTEND

55TH ANNUAL ESTATE PLANNING SHORT COURSE A/V PRODUCTS

DVD (C2008-VID) \$549*

AUDIO CD (C2008-AUD) \$549*

TOTAL



PHONE
800-252-8062
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3161 W. White Oaks Dr.
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Springfield, IL 62704

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I am not an IL licensed attorney.

Name _____

Firm _____

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E-mail _____

Phone _____ Fax _____

PAYMENT METHOD

Check enclosed (payable to IICLE®)

Charge my:

VISA MasterCard Discover AMEX

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Signature _____

Marketing Code: C2008-CEPC

ADDITIONAL INFORMATION:

*Price includes 8% IL sales tax. Some tax-exempt organizations may subtract tax. Certificate of exemption is required with order.

Video and audio recordings available approximately 8 weeks after live event.

MCLE credit for recordings may vary from live course due to editing.

For cancellation policy and other terms and conditions, see www.iicle.com.

AGENDA

DAY ONE

MODERATORS:

Chicago: **Susan D. Snyder**, *Northern Trust*, Chicago

Champaign: **James M. Lestikow**,
Hinshaw & Culbertson LLP, Springfield

RECENT DEVELOPMENTS

Federal Estate, Gift and Generation – Skipping Taxes

Karen Van Meter, *McDermott Will & Emery*, Chicago

Federal Income Taxation Related to Estate Planning and Administration

Robert A. Romanoff, *Levenfeld Pearlstein, LLC*, Northbrook

Illinois Law: Case Decisions & Trends

Robert E. Hamilton, *Hamilton Thies & Lorch LLP*, Chicago

Preserving Flexibility when Planning for Trusts

Susan Porter, *Brown Brothers Harriman Trust Company, N.A.*, New York City

Session Sponsored by *Brown Brothers Harriman Trust Company, N.A.*

Top 25 Life Insurance Planning Mistakes

Lawrence Brody, *Bryan Cave LLP*, St. Louis

Estate Planning for Retirement Assets and Executive Compensation

Steven R. Lifson, *Seyfarth Shaw LLP*, Chicago

DAY TWO

ROOM A

Moderators:

Chicago: **Mary C. Downie**, *Clark Hill PLC*, Chicago

Champaign: **Robert A. Stuart Jr.**,
Brown, Hay & Stephens, LLP, Springfield

Things To Do in Cyberspace Before You're Dead and After

Gregg M. Simon, *Much Shelist*, Chicago
Fredrick B. Weber, *Northern Trust*, Chicago

Powers of Appointment — When To Hold 'Em, When To Walk Away, and When To Run

Jonathan W. Michael,
Burke Warren MacKay & Serritella PC, Chicago
Stacy E. Singer, *Northern Trust*, Chicago

Issues To Consider When Choosing a Trustee

Pamela L. Lucina, *JP Morgan*, Chicago
Barbara R. Grayson, *Mayer Brown LLP*, Chicago

Business Succession Planning for Family Businesses and Key Employees

Chicago: **Katarinna McBride**, *Handler Thayer, LLP*, Chicago
Champaign: **Thomas G. Hamill**,
Harrison & Held, LLP, Springfield

Representing Trust and Estate Beneficiaries

David M. Lutrey, *Lesser Lutrey & McGlynn LLP*, Lake Forest
Ray J. Koenig III, *Clark Hill PLC*, Chicago

Practice Management

Lorraine K. Cavataio,
Mathis, Marifian & Richter, Ltd., Belleville
Chicago: **Susan D. Snyder**, *Northern Trust*, Chicago
(includes 1 hour PMCLE pending approval)

ROOM B

Moderators:

Chicago: **Stephen A. Frost**, *Hinshaw & Culbertson LLP*, Lisle

Champaign: **George W. Howard III**,
Howard, Leggans, Piercy, & Howard, LLP, Mt. Vernon

What Every Estate Planner Needs To Know About Income Tax

Janet Rae Montgomery, *Daluga & Boland, LLC*, Chicago

Multistate and Mobile Trusts

Suzanne L. Shier, *Northern Trust*, Chicago

Asset Protection

William A. Ensing, *Ensing Law Firm, Ltd.*, Lake Forest

Changes to Irrevocable Trusts

Benjamin N. Feder, *Strauss & Malk LLP*, Northbrook
Benetta Park Jenson, *J.P. Morgan Private Bank*, Chicago
Natalie M. Perry, *Shefsky & Froelich*, Chicago

Gifts with Higher Exemptions

Todd J. Schneider, *Reed Smith LLP*, Chicago

What Can I Say to a Trustee That I Can't (or Won't Have To) Say to a Beneficiary? Exploring the Pros and Cons of the Fiduciary Exception to the Attorney-Client Privilege

Rebecca Wallenfelsz, *Chapman & Cutler LLP*, Chicago
(includes 1 hour PMCLE pending approval)