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Webcast Location:

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Webcast Location:

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Rock Island, IL

HOW TO REGISTER:

- **Peoria**: Call Lori Helvick (309) 655-1346
- **E-mail:** Lori_Helvick@usc.salvationarmy.org
- **Fax:** (309) 655-7271

- **Quad Cities**: Call Steve Garrington (563) 370-2145
- **E-mail:** steve.garrington@usc.salvationarmy.org
- **Fax:** (563) 391-3672
- **Mail:** Return the registration form to:

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PO Box 1468, Peoria, IL 61655-1468

QUESTIONS?

CONTACT:

- Lori Helvick, (309) 655-1346
- Sam Amick, (309) 655-1654
- Steve Garrington, (563) 370-2145
- April Gould, (309) 655-1653

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Estate Planning 2009
featuring Roy Adams and Christopher Hoyt
- East Peoria, IL
- Rock Island, IL
- Several Other Webcast Locations

The 17th Annual

ESTATE & CHARITABLE GIFT PLANNING INSTITUTE

Coping With Change: Like It Or Not

FEATURING

Roy M. Adams
&
Christopher Hoyt

Monday
September 14, 2009

Broadcast live from
Minneapolis to:

Illinois Central College, East Peoria, IL
Augustana College, Rock Island, IL
& Other Webcast Locations

Continuing Education Credits Pending

Presented By

THE SALVATION ARMY

Heartland Division

"The largest estate and charitable gift planning conference in the nation."

Monday, September 14, 2009

ETHICS SESSION 9:00-10:00 Roy Adams

Fiduciary Liability- Ethics and All That:

- Exoneration provisions violate public policy.
- Retention of assets- still a prickly pear.

SESSION I 10:00 a.m.- noon Roy M. Adams

The Big Bang!

In the universe of estate planning, what is going on about us is truly the equivalent of the Big Bang theory as it pertains to the World's origination. New laws push us to understand that what was done in the past is more important than ever.

- The $3,500,000 Federal exemption and its implications for planning
- Valuation issues, particularly the Alternate Valuation Date
- Our old friend, Section 2036, with final regulations.

To "FLOP" or Not…

Is the climate now improving for certain Family Limited Partnerships, or is improvement too frail to be trusted?

- Family Limited Partnerships and Limited Liability Companies- a blend of the old and the new.

LUNCH 12:00 noon—12:45 p.m.

SESSION II 12:50 -3:00 p.m. Christopher Hoyt

How To Do Your Roth IRA Conversion in 2010

In 2010, wealthy individuals will finally be able to convert regular IRAs, 401 (k) accounts and 403 (b) accounts to Roth IRAs without any income limitation. How is it done? Should it be done?

- A summary of the rules for 2010, including deferring income into 2011 and 2012 from the Roth IRA conversion
- If investments fluctuate during 2010, how can a Roth IRA conversion be undone and what are the implications?
- A summary of other recent developments involving retirement plan distributions, including challenges and solutions from charitable bequests of retirement plan assets.

SESSION III 3:00 p.m.- 4:00 p.m.

Roy M. Adams & Christopher Hoyt

Charitable Uproar:

- IRA charitable rollover extended.
- Charitable deduction of donated stock reduced
- Estate tax charitable deduction denied

Questions & Answers 3:45 – 4:00 p.m.

ROY M. ADAMS is the Managing Member of ROY M. ADAMS & ASSOCIATES PLLC, a partner of CONSTANTINE | CANNON LLP. The two firms are formally integrated and affiliated for the practice of law including major emphasis in the fields of trusts & estates and litigation. Mr. Adams previously was Sr. Chairman of the Trusts & Estates Practice Group at the firm of Sonnenschein Nath & Rosenthal LLP and held positions as the Co-Chair of the Trusts & Estates Practice Group at Schiff Hardin & Waite and Worldwide Head of the Trusts and Estates Practice Group at Kirkland & Ellis LLP.

Mr. Adams conducts an extensive national and international practice in the areas of estate and tax planning & administration, advising individuals & major families on wealth transfer techniques at federal and state levels and private foundations and public charities. He lectures nationally and internationally and is a greatly sought-after speaker. He is admitted to practice in the states of New York and Illinois. Mr. Adams is Professor Emeritus of Estate Planning & Taxation at Northwestern University School of Law where, for over 25 years, he has taught estate planning and taxation. Mr. Adams was the Dean of the Trust School & National Graduate Trust School of the American Bankers Association for over ten years and was frequently honored by the ABA for his exemplary teaching.

Mr. Adams also serves as a member of the Tax Advisory Boards of the Museum of Modern Art and of Lincoln Center for the Performing Arts, both in New York City. Mr. Adams is a member of the distinguished teaching faculty of Cannon Financial Institute, & is also a Senior Consultant to Cannon's management.

He contributes extensively to internet publications through a joint venture with Cannon, and leads special professional education seminars and monthly telephone conferences, as well as web-casts and satellite broadcasts, on sophisticated but practical estate, trust and business succession planning and administration topics.

Mr. Adams is a Fellow of the American College of Trusts and Estates Counsel and is listed in "Best Lawyers in America." Mr. Adams has been conferred "Best Lawyer" status by THE AMERICAN LAWYER. Mr. Adams was honored in 2006 with the "Distinguished Accredited Estate Planner Designation and Award" by The National Association of Estate Planners & Councils.

He is a Special Consultant to TRUSTS & ESTATES MAGAZINE, for which he writes a bimonthly column. He often contributes a column on estate planning, designed for the brokerage community, to REGISTERED REPRESENTATIVE MAGAZINE, and articles on estate planning to FINANCIAL ADVISOR MAGAZINE. His newest book, 21st CENTURY ESTATE PLANNING: PRACTICAL APPLICATIONS, was first published by Cannon Financial Institute in 2002, is revised each year, and has received great acclaim, particularly for its innovation, creativity and practical advice.

The 2007 Edition has also been well-received. Mr. Adams has authored a two-volume text, ILLINOIS ESTATE PLANNING, WILL DRAFTING AND ESTATE ADMINISTRATION, and has been a Contributing Editor to UNDERSTANDING LIVING TRUSTS. Another of his popular publications is entitled WIT & WISDOM - THE BEST OF ROY ADAMS.

CHRISTOPHER HOYT is a Professor of Law at the University of Missouri (Kansas City) School of Law where he teaches courses in the area of federal income taxation and business organizations. Previously, he was with the law firm of Spencer, Fane, Britt and Browne in Kansas City, Missouri. He received an undergraduate degree in economics from Northwestern University and he received dual law and accounting degrees from the University of Wisconsin. Professor Hoyt is currently the Co-Chair of the American Bar Association's Committee on Charitable Organizations (Section of Trusts and Estates). He is an ACTEC Fellow and he serves on the editorial boards of Trusts and Estate Magazine and the Planned Giving Design Center. He is a frequent speaker at legal and educational programs and has been quoted in numerous publications, including The Wall Street Journal, Forbes, MONEY Magazine, The New York Times and The Washington Post.

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September 4, 2009
For a location near you!

Please register and return by

Friday, September 4, 2009

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(one form per participant, copy if needed)

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Indicate sessions you will be attending:

- ☐ All sessions
- ☐ Ethics Presentation
- ☐ Session I
- ☐ Session II
- ☐ Session III

Indicate which location you will be attending:

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