Planning For The Generations August 11-13, 2010

Wednesday, August 11

Time	Advanced Track	Essentials Track	Elder Law Track
8:30 a.m. - 8:45 a.m.	Opening Remarks & Welcome Address		
8:45 a.m. - 10:00 a.m.	Preparing for 2011-How to Plan for the Return of The Federal Estate Tax Lewis Dymond, Jr., JD and Thomas Ray, Jr., JD		
10:20 a.m. - 12:00 p.m.	Elder Law and Special Needs Planning - The State of Affairs in 2010, Louis Pierro, JD and Vincent Russo, JD, LL.M., CELA		
12:00 p.m. - 1:00 p.m.	Complimentary Network Luncheon		
1:00 p.m. - 2:30 p.m.	Advanced Planning Strategies in 2010 - Lifetime Gifts and GSTT Transfers D. Scott Schrader, JD	The Whiteboard Interview - The Design of the Joint Living Trust Peter J. Parenti, JD	Variations on a Medicaid Crisis Plan Michael Amoruso, JD
3:00 p.m. - 4:00 p.m.	Keynote Presentation: The Power of Roth IRA Conversions in 2010, Robert S. Keebler, CPA, MST, AEP		
4:15 p.m. - 5:15 p.m.	Keynote Presentation: Let's Push the Wheelbarrow - Right-Side Up, Orion Samuelson		

Thursday, August 12

Time	Advanced Track	Essentials Track	Elder Law Track
8:20 a.m. - 10:00 a.m.	Trust Protectors & Trust Advisors Matthew Grupp, Esq., LL.M (in Taxation) CM&AA	Practical Planning for Farmers Ranchers, & Vintners Stan Miller, JD and David Naples, JD, LL.M	Five Proven Trust Techniques to Supercharge Your Elder Law Practice Louis Pierro, JD
10:20 a.m. - 12:00 p.m.	Irrevocable Beneficiary Owned Trusts (IBOT) Marc Selden, JD	Practical Planning and Drafting LLCs and DAPT Cecil Smith, JD and Carol Gonnella, JD	Elder Abuse - What You Must Know for Your Elder Law Practice Vincent Russo, JD, LL.M, CELA and Kerry R. Peck, JD
12:00 p.m. - 1:20 p.m.	Complimentary Networking Luncheon		
1:20 p.m. - 3:00 p.m.	Business Succession & Estate Planning: Improve Your Practice by Adding Business Succession Planning Services James Flick, JD	Estate Planning Strategies That Will Interest Your Referral Sources Randall Borkus, JD, LL.M and Scott Hamilton, JD	Planning for Persons with MS Stephen W. Dale, JD
3:20 p.m. - 5:00 p.m.	How I Built a Profitable Estate Planning Practice and Sold it for a Tidy Sum Jan Copley, JD	Advanced Planning with Legal Structures and Life Insurance Scott Hamilton, JD	Pitfalls to Avoid When Planning for Clients Who Are Veterans James Swain, JD and Valerie Peterson, JD
6:00 p.m. - 8:00 p.m.	Advisors Forum Reception		

Friday, August 13

Time	Advanced Track	Essentials Track	Elder Law Track
8:20 a.m. - 10:00 a.m.	Planning For Same-Sex Couples And The Changing Definition Of Marriage Jerry Simon Chasen, JD, LL.M and Scott Squillace, JD	Creating Client Maintenance Programs Vincent Bonazzoli, JD, Laura Wilson and Wayne Wilson, JD	Are You Tripping Over Dollars to Make Pennies in Your Elder Law Practice? Steven Riley, JD and Valerie Peterson, JD
10:20 a.m. - 12:00 p.m.	Planning for Physicians James Flick, JD and Mark Monasky, MD, JD, FACS, FCLM	Planning for Dysfunctional Families David Hiersekorn, JD	Adding SPICE to Your Elder Law Practice Rick Law, JD
12:00 p.m. - 1:20 p.m.	Complimentary Networking Luncheon Sponsored by Jagen Investments, LLC		
1:20 p.m. - 3:00 p.m.	Advanced Charitable Planning Strategies Thomas Ray, Jr., JD	Marketing Strategies for 2010 and Beyond Steven Riley, JD and Peter G. Lennington, JD	
3:30 p.m. - 4:40 p.m.	General Session: Practice Group Roundtable		
4:40 p.m. - 5:00 p.m.	Closing Remarks		

General Session — Advanced Track — Essentials Track — Elder Law Track