AICPA®

Celebrating over 30 years of premier learning…

Advanced Estate Planning Conference

JULY 18-20, 2011

Boston Marriott Copley Place
Boston, MA

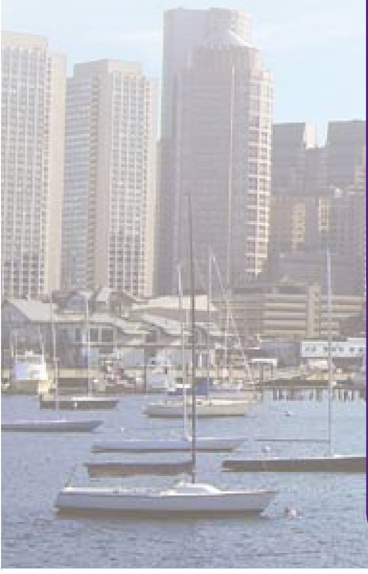
CPE, CLE & CFP Credits Available!

Early Bird Registration ***Save $75*** *by 6/3/11*

Pre-Conference Value-Added Workshops

Sunday, July 17th

Focusing on the fundamentals, these in-depth sessions provide the estate planning framework!



Leading experts provide perspective on the key issues facing estate planning professionals today:

- What are the game-changing aspects of the 2010 tax legislation?
- What are the best ways to structure estate planning for 2011 and beyond?
- Where do the politics and policy of estate and tax planning intersect?

Hotel cutoff date: 6/20/2011

Tax & PFP Section Members, PFS Credential Holders
SAVE AN ADDITIONAL $100

Learn more or register
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Get the critical insights and best planning techniques to make sense of sweeping tax legislation and its impact on your clients.

Despite the recent changes in tax and estate legislation, experts agree that many challenges still exist. Clients may be reluctant to make drastic changes, given the uncertainties in the new legislative and economic environment. Being able to meet client objectives and offer strategic options in ways that are tax efficient is key to gaining their confidence and measuring success.

Leading the way, as it has for over 30 years, the 2011 **AICPA Advanced Estate Planning Conference** focuses on today's challenges in an intensive three days. This premier event delivers the top-notch, hands-on training and up-to-the minute information practitioners have come to expect. Interactive sessions, classroom discussions and case studies are structured to provide advanced material with in-depth coverage on all the issues that impact estate planning. A broad choice of up to four concurrent sessions covering a wide range of topics helps ensure that CPAs and attorneys get the answers to problems they frequently encounter, and the resources to confidently act as their clients' most trusted financial advisors.

Hot Topics

- Estate Planning & the New Law
- Current Developments in Estate Planning
- FLPs & Family LLCs
- Advanced IRA Issues
- Life Insurance Update

Industry Experts Share Their Knowledge.

Hear the latest updates from those "in the know"– including **Dennis Belcher**, **Daniel Daniels, Gary Zwick**, **Robert Keebler**, **Charles Fox IV, Conrad Teitell**, and **Ron Aucutt**, among others. Get the "big picture" outlook, valuable insights and expert analysis of the issues that you can put to work immediately for your clients.

Who Should Attend

CPAs, financial planners, attorneys, insurance agents and tax advisors with a fundamental knowledge of estate planning

Don't Miss Our Pre-Conference Workshops on Sunday, July 17th

By moving the fundamental training classes to the pre-conference day, we've made room for the more advanced sessions you've asked for!

Thank You to Our Sponsor!

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BENEFITS JUST FOR ATTENDEES!

An Eco-Friendly and Paperless Initiative

In an effort to be more environmentally friendly, cost conscious and forward-thinking, AICPA Meetings & Conferences is offering participants access to conference materials via a speaker materials website in advance of the conference.

Free Access to Conference Session Recordings

*Be sure to supply a valid email address when registering. Instructions to access the speaker materials and conference recording website [AICPAConferenceMaterials.com] are distributed via email approximately two weeks prior to the start of the conference. Also, add service@aicpa.org to your safe sender list.

Register by 6/3/11 SAVE $75!

Conference at a Glance

Concurrent Sessions

PRE-CONFERENCE / SUNDAY, JULY 17 / VALUE-ADDED WORKSHOPS (additional fee)

1:30 pm - 3:10 pm	Select one	**101 Fundamentals of Estate Planning –** ***P. Thomas Austin***	**102 Fundamentals of 706 –** ***Laura H. Peebles***
3:10 pm - 3:30 pm	**Change Break**		
3:30 pm - 5:10 pm	**103 Fundamentals of GST –** ***Daniel L. Daniels***		
5:15 pm - 6:30 pm	**104 AICPA Townhall** (complimentary – all are invited)		

MAIN CONFERENCE / MONDAY, JULY 18 / DAY ONE

8:00 am - 8:10 am	**Opening Remarks –** ***P. Thomas Austin***				
8:10 am - 9:50 am	**1 Current Developments in Estate Planning –** ***Dennis I. Belcher***				
9:50 am -10:20 am	**Networking Break & Vendor Display**				
10:20 am -11:10 am	**2 GST –** ***Daniel L. Daniels***				
11:10 am -12:25 pm	**3 FLP & Family LLCs –** ***Gary Zwick***				
12:25 pm - 1:25 pm	**Luncheon**				
1:25 pm - 2:40 pm	Select One	**4 Life Insurance Update –** ***Lee Slavutin & Larry Brody*** **(includes Networking Break & Vendor Display)**	**5 Advanced IRA –** ***Robert S. Keebler & Barry C. Picker*** **(includes Networking Break & Vendor Display)**	**6 Intro to Trusts –** ***Missia H. Vaselaney***	**7 Charitable Remainder Trust: Form 5227 –** ***Laura H. Peebles & James R. Avedisian***
2:40 pm - 3:10 pm				**Networking Break & Vendor Display**	
3:10 pm - 4:35 pm				**8 CPA's Review of Wills & Trusts –** ***Missia H. Vaselaney***	**9 IRS Compliance Issues –** ***Steven J. Brown & Theresa Stylianou***
4:40 pm - 5:55 pm				**10 Trust Provisions –** ***Jeff Saccacio***	**11 Hedge Funds –** ***Paul S. Lee***
6:00 pm - 7:15 pm	**Networking Reception**				

MAIN CONFERENCE / TUESDAY, JULY 19 / DAY TWO

7:00 am - 7:50 am	Select one	**12 IRS Q&A –** ***Theresa Stylianou***	**13 Community Property –** ***James R. Avedisian***	**14 Fiduciary Litigation –** ***Missia H. Vaselaney***	**15 Hedge Funds Q&A –** ***Paul S. Lee***
8:00 am - 9:15 am	**16 IRAs –** ***Robert S. Keebler***				
9:15 am -10:30 am	**17 Planning Considerations Resulting from New Legislation –** ***Charles Fox IV***				
10:30 am -11:00 am	**Networking Break & Vendor Display**				
11:00 am -12:15 pm	Select One	**18 Formula Clauses –** ***Gary Zwick***	**19 Estate Planning for S Corporations –** ***Steven J. Brown & Jeremiah W. Doyle***	**20 Advanced 706 –** ***James R. Avedisian & Laura H. Peebles***	**21 Fiduciary Accounting –** ***Gordon Spoor***
12:15 pm - 1:15 pm	**Luncheon**				
1:15 pm - 2:30 pm	Select One	**22 Fundamentals of 1041 –** ***Jeremiah W. Doyle***	**23 Business Succession Planning –** ***Bill Murray, Julius Giarmarco, & Charlie Ratner*** (continued in #27)	**24 IRA Horror Stories –** ***Ed Slott*** (Repeated in #31)	**25 Eldercare –** ***Mike Gilfix***
2:30 pm - 3:00 pm	**Networking Break & Vendor Display**				
3:00 pm - 4:15 pm	Select One	**26 Advanced 1041 –** ***Jeremiah W. Doyle***	**27 Business Succession Planning** (continuation of #23)	**28 Mathematics of Estate Planning –** ***Robert S. Keebler***	**29 Special Needs –** ***Mike Gilfix***
4:25 pm - 5:40 pm		**30 Funding Bequests –** ***Jackie Patterson***		**31 IRA Horror Stories –** ***Ed Slott*** (repeat of #24)	**32 Unraveling Family Law Partnerships –** ***Robert Pluth, Harmon Brown***

MAIN CONFERENCE / WEDNESDAY, JULY 20 / DAY THREE

7:00 am - 7:50 am	Select One	**33 Hollywood's Take on Estate Planning –** ***Missia H. Vaselaney***	**34 Carryover Basis Q&A –** ***Robert S. Keebler***	**35 709 Q&A –** ***Laura H. Peebles***	**36 Fiduciary Accounting Q&A –** ***Gordon Spoor***
8:00 am - 9:15 am	Select One	**37 Issues in International Estate Planning –** ***Elizabeth M. Schurig***	**38 Integration of Philanthropy into Wealth Planning –** ***Jeff Saccacio***	**39 QTIPs –** ***Michael Jones***	**40 Accounting and Tax Issues in Estate Administration –** ***Jackie Patterson***
9:15 am - 9:45 am	**Networking Break & Vendor Display**				
9:45 am - 11:00 am	Select One	**41 Domestic & Offshore Asset Protection Planning –** ***Elizabeth M. Schurig***	**42 Estate Planning for Real Estate –** ***Stefan F. Tucker***	**43 IRAs Payable to Trusts –** ***Michael Jones***	**44 Family Governance –** ***Tom Rogerson***
11:10 am - 12:25 pm				**45 Post Mortem –** ***Jeremiah W. Doyle***	**46 Advanced Roth Conversion –** ***Robert S. Keebler***
12:25 pm - 1:15 pm	**Luncheon**				
1:15 pm - 2:10 pm	**47 Charitable Giving During Lifetime –** ***Conrad Teitell***				
2:15 pm - 3:10 pm	**48 Estate Legislation Update –** ***Ronald D. Aucutt***				
3:10 pm	**Conference Adjourns**				

4 WAYS TO REGISTER FAST

ONLINE*: www.cpa2biz.com/conferences **PHONE*:** 1.888.777.7077 or 1.919.402.4500
FAX*: 1.800.362.5066 or 1.919.419.4795
MAIL: Complete and mail the form along with your promotion code to:
AICPA Member Service Center, Conferences, 220 Leigh Farm Road, Durham, NC 27707-8110
*Credit card registration only (American Express®, Diners Club®, Discover®, MasterCard® or VISA®)

RECOMMENDED CPE CREDIT 25.5 (main), up to 4 (optional)
This conference was prepared in accordance with the Joint AICPA/NASBA Statement on Standards for Continuing Professional Education (CPE) Programs effective on January 1, 2002. The recommended CPE Credits are in accordance with these standards; however, your individual state board is the final authority on the acceptance of programs for CPE credit.

Did you know? CLE and CFP credits are also available.
Please contact credit@aicpa.org for more information.

CONFERENCE FEE
Registration fees are determined by current membership status in the AICPA. Please indicate member number on the registration form to obtain the correct discount. Conference fee includes all sessions, conference materials, continental breakfasts, refreshment breaks, luncheons and a reception. Fee for value-added workshops includes all session materials and refreshment breaks.

GROUP REGISTRATION
Registration for 2 or more individuals at the same time may qualify for group discounts; additional savings may be available for groups of 10 or more. For more information please call the AICPA Service Center at 888.777.7077 (9AM-6PM ET). **Program Code: EST11**

DRESS CODE Business Casual

CANCELLATION POLICY
You may cancel without penalty if written cancellation requests are received by June 3, 2011. Due to financial obligations incurred by the AICPA, a credit voucher less 50% of the registration fee will be issued for written requests received by June 27, 2011. No refunds or credits will be issued on cancellation requests received on or after June 28, 2011. For further information, call the AICPA Service Center at **888.777.7077**.

HOTEL AND GROUND TRANSPORTATION INFORMATION
Contact the hotel directly to obtain their policy on reservations, deposits and cancellations. Rooms will be assigned on a space-available basis only. To receive our special group rates mention that you will be attending the **AICPA Advanced Estate Planning Conference.**

Boston Marriott Copley Place
110 Huntington Avenue
Boston, MA 02116

Hotel Phone: 617.236.5800
Hotel Reservations: 800.228.9290
Online Reservations: http://tiny.cc/EST11
Hotel Room Rate: $209 single/double
Hotel Reservation Cutoff Date: June 20, 2011

Ground Transportation — to and from the hotel and airport (please note, rates and times are approximate)
Taxi Service: $35-$45 each way, 20 minutes **Hotel Parking:** Valet and Onsite Parking $44 per day, Offsite Parking $35 per day

AIRLINE INFORMATION
The AICPA has a special arrangement with Maupin Travel, Inc. of North Carolina to assist you with your travel arrangements. This travel agency may be reached at 800.345.5540. If you prefer to make your own travel plans, be sure to mention the participating airline's reference number (listed below) to take advantage of deeply discounted "Zone Fares" that do not require a Saturday night stay-over. Discounts are valid for round trip registered AICPA meetings or conferences only. Some restrictions may apply.

American Airlines	800.433.1790	Index #21445
United Airlines	800.521.4041	Refer to Meeting ID #531SI
Delta Airlines	800.328.1111	Refer to Meeting ID #NM66P

For up-to-date airline information regarding special travel discounts, please visit **cpa2biz.com/conferences**. Due to recent airline industry fare restructuring, we cannot guarantee that the above group travel agreements will be in effect at the time when you are making your travel arrangements. Please contact the airline and/or your travel agency for latest applicable discounts and arrangements.

CAR RENTAL
Hertz Car Rental — AICPA Member Discounts: Call 800.654.2240. Ref. Code CV#021H0018. Airline and car rental discounts are available only when you or your travel agent book through the 800 number. We strongly advise you to confirm your conference registration and hotel reservation prior to making your travel plans.

EXHIBIT AND SPONSORSHIP OPPORTUNITIES
Don't miss the opportunity to present and sell your organization's services and products to thousands of CPAs and financial professionals at AICPA conferences. For detailed information on conference exhibit and sponsorship opportunities, please send your email to **exhibit@aicpa.org**.

The Best of Boston!
The award-winning Boston Marriott Copley Place hotel is centrally located in Boston's historic Back Bay district. After a full day of meetings, minutes away you'll find Trinity Church and Boston Common; fine shopping and dining on ritzy Newbury Street or the Copley Place Mall; or your favorite sports team at Fenway Park or the TD Garden.

AICPA American Institute of CPAs

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Register by 6/3/11 SAVE $75

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Advanced Estate Planning Conference

MEMBERSHIP/REGISTRATION INFORMATION

AICPA Member? ☐ Yes ☐ No

AICPA MEMBER NO.

NICKNAME FOR BADGE   BUSINESS TELEPHONE

TITLE

E-MAIL ADDRESS

Please photocopy this form for additional registrants.
If the information on your label is incorrect, please complete the following:

LAST NAME   FIRST NAME   MI

FIRM NAME OR AFFILIATION

STREET ADDRESS   SUITE   PO BOX

CITY   STATE   ZIP

In accordance with the Americans with Disabilities Act, do you have any special needs? ☐ Yes ☐ No
(If yes, you will be contacted.)

11CPA-454   EST11   071811

CONFERENCE FEES Please circle appropriate rate.

	PFP/PFS or Tax Section Member	AICPA Member	Non-Member
JULY 18-20- BOSTON, MA (EST11)			
☐ **Early Bird Registration** SAVE $75 by 6/3/11	**$870**	**$970**	**$1,270**
☐ **Regular Registration**	**$945**	**$1,045**	**$1,345**
PRE-CONFERENCE WORKSHOPS -SUNDAY, JULY 17 (additional fee)			
1:30 pm - 3:10 pm (select one)	**$175**	**$175**	**$175**
☐ **101** Fundamentals of Estate Planning			
☐ **102** Fundamentals of 706			
3:30 pm - 5:10 pm	**$175**	**$175**	**$175**
☐ **103** Fundamentals of GST			
5:15 pm - 6:30 pm (complimentary)			
☐ **104** AICPA Townhall			
Total	$______	$______	$______

PAYMENT INFORMATION Full payment must accompany registration form.

My check for $____________ payable to AICPA is enclosed.

OR Please bill my credit card for $____________

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☐ MasterCard® ☐ VISA®

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