

AICPA conference

Register by 6/11/06
SAVE \$75!

AICPA Advanced Estate Planning Conference

**CLE credits
now
available!**
See inside for details



JULY 26–28, 2006

**Manchester Grand Hyatt
San Diego, CA**

Pre-Conference Optional Workshops: Tuesday, July 25



www.cpa2biz.com/conferences

888.777.7077

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WHY ATTEND?

Updates on Life Insurance, Asset Protection, Charitable Planning, Non-qualified Deferred Compensation and IRAs

Top-level speakers will provide critical insights

Intensive learning through workshops, case studies and interactive sessions

Designed by practitioners for practitioners — get advanced training, latest strategies, CPE credit and great networking opportunities



Fabulous San Diego — the best of everything!

With its prime waterfront location and knockout views, the Manchester Grand Hyatt offers everything you could want in a Southern California resort: luxurious rooms, delicious food, unparalleled service and proximity to beaches, shopping and entertainment. Adjacent to Seaport Village, you'll love the Hyatt's easy access to world famous San Diego Zoo, Sea World®, historic Old Town, Balboa Park and Mexico.

Discuss Estate Planning strategies with the nation's leading authorities.

Current Trends: Many of your professional peers from all over the country are applying innovative strategies to offer high-level services and generate profitable engagements.

Conference Focus: The **2006 Advanced Estate**

Planning Conference is a great opportunity for you to receive advanced technical training on the latest aspects of estate, gift and inheritance planning. Fast-paced and results-oriented, this conference will enable you to strengthen your skills, share ideas with colleagues and get insights on critical Estate Planning issues from leading experts.

Importantly, you'll return to work with a wealth of materials, plus the tools and strategies needed to offer your clients the highest levels of Estate Planning service.

Speakers are top-notch and include: Johnathan Blattmachr, Stacy Eastland, Bob Keebler, Stephen Leimberg, Ed Slott and Conrad Teitell.

Who Should Attend? CPAs, financial planners, attorneys, insurance agents and tax advisors who want to build their business and their client relationships.

Getting CLE credit is now even easier! The 2006 Advanced Estate Planning Conference now qualifies for Continuing Legal Education credits in some states. Please contact us at CLErequests@aicpa.org to see if CLE has been applied for in your state.

SAVE \$75!

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AICPA ADVANCED ESTATE PLANNING CONFERENCE

4 EASY WAYS TO REGISTER **1** ONLINE*: www.cpa2biz.com/conferences
 PFP and Tax Section Members use code **SECTION 50** to receive member prices.

MEMBERSHIP INFORMATION

Very important — please be sure to complete.

AICPA Member? Yes No Membership No. (Required for discount prices)

PFP or Tax Section Member? Yes No

NICKNAME FOR BADGE

BUSINESS TELEPHONE

TITLE

E-MAIL ADDRESS

REGISTRATION INFORMATION

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.)

*Credit Card Registrations Only

2 PHONE*: 1-888-777-7077 or 1-201-938-3000

3 FAX*: 1-800-870-6611 or 1-201-938-3108

4 MAIL: AICPA Conference Registration
 PO Box 2210, Jersey City, NJ 07303-2210

PAYMENT INFORMATION

Full payment must accompany registration form.

My check for \$ _____ payable to AICPA is enclosed.

OR Please bill my credit card for \$ _____.

AICPA VISA® Credit Card¹ American Express® Diners Club®
 Discover® MasterCard® VISA®

¹If you don't presently have an AICPA VISA® Credit Card, please call 1-866-CPA-VISA for more information or to apply for the card.

CARD NO.

EXP DATE

BILLING NAME

SIGNATURE

ACPA USE ONLY — EST06

Customer No.

Promotion Code

CONFERENCE PLANNER

For up-to-date agenda details and full session descriptions,
 please visit www.cpa2biz.com/conferences

WEDNESDAY, JULY 26 Concurrent Sessions

1:15 pm – 2:55 pm	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8
3:25 pm – 4:15 pm	<input type="checkbox"/> 9	<input type="checkbox"/> 10	<input type="checkbox"/> 11	<input type="checkbox"/> 12	<input type="checkbox"/> 13
4:25 pm – 5:15 pm	<input type="checkbox"/> 14	<input type="checkbox"/> 15	<input type="checkbox"/> 16	<input type="checkbox"/> 17	<input type="checkbox"/> 18

THURSDAY, JULY 27 Concurrent Sessions

7:00 am – 7:50 am	<input type="checkbox"/> 201	<input type="checkbox"/> 202	<input type="checkbox"/> 203	<input type="checkbox"/> 204	<input type="checkbox"/> 205
8:00 am – 12:00 pm	<input type="checkbox"/> 19	<input type="checkbox"/> 20	<input type="checkbox"/> 21		
1:30 pm – 2:20 pm	<input type="checkbox"/> 22	<input type="checkbox"/> 23	<input type="checkbox"/> 24	<input type="checkbox"/> 25	
2:25 pm – 3:15 pm	<input type="checkbox"/> 26	<input type="checkbox"/> 27	<input type="checkbox"/> 28	<input type="checkbox"/> 29	
3:45 pm – 4:35 pm	<input type="checkbox"/> 30	<input type="checkbox"/> 31	<input type="checkbox"/> 32	<input type="checkbox"/> 33	
4:40 pm – 5:30 pm	<input type="checkbox"/> 34	<input type="checkbox"/> 35	<input type="checkbox"/> 36	<input type="checkbox"/> 37	

FRIDAY, JULY 28 Concurrent Sessions

7:00 am – 7:50 am	<input type="checkbox"/> 206	<input type="checkbox"/> 207	<input type="checkbox"/> 208	<input type="checkbox"/> 209	<input type="checkbox"/> 210
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Conference agenda

Advanced Estate Planning Conference

Topics and speakers are subject to change

TUESDAY, JULY 25 PRE-CONFERENCE OPTIONAL WORKSHOPS (additional fee)

12:00 pm – 6:00 pm	Registration & Message Center Open
1:00 pm – 4:00 pm	Optional Workshop 101 Fundamentals of Estate Planning including Basic GSTs
2:00 pm – 4:00 pm	Optional Workshop 102 Marketing Ideas
4:00 pm – 6:00 pm	Concurrent Workshops (Select one) 103 Basics of Community Property 104 Fundamentals of FLPs

WEDNESDAY, JULY 26 MAIN CONFERENCE — DAY ONE

7:00 am – 5:15 pm	Registration & Message Center Open
7:00 am – 8:00 am	Continental Breakfast
8:00 am – 8:10 am	Welcome — Tom Austin, Conference Chair
8:10 am – 10:05 am	1 Current Developments — Howard Zaritsky
10:05 am – 10:25 am	Refreshment Break and Vendor Display
10:25 am – 11:15 am	2 Asset Protection — Elizabeth Schurig
11:15 am – 12:15 pm	3 Life Insurance Update — Stephen Leimberg
12:15 pm – 1:15 pm	Lunch
1:15 pm – 2:55 pm	Concurrent Sessions (Select one) 4 1041 Preparation (repeated in combined sessions 25 & 26) 5 Elder Law and Planning 6 Valuations 7 Private Foundations and Donor Advised Funds 8 Building Your Family Legacy Using Trusts
2:55 pm – 3:25 pm	Refreshment Break and Vendor Display
3:25 pm – 4:15 pm	Concurrent Sessions (Select one) 9 Estate Planning Using Special Needs Trust 10 Life Insurance Issues 11 Off-Shore Planning 12 Selecting a Situs 13 Adequate Disclosures
4:15 pm – 4:25 pm	Change Break
4:25 pm – 5:15 pm	Concurrent Sessions (Select one) 14 Advanced GST 15 Life Insurance Q&A 16 Trusts as S Corp Shareholders 17 IRA Horror Stories (repeated in session 28) 18 Estate Planning for Non-Traditional Families
5:15 pm – 6:15 pm	Reception and Vendor Display

For up-to-date agenda details and full session descriptions, please visit www.cpa2biz.com/conferences

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THURSDAY, JULY 27 MAIN CONFERENCE — DAY TWO

7:00 am – 5:30 pm	Registration & Message Center Open
7:00 am – 8:00 am	Continental Breakfast
7:00 am – 7:50 am	Concurrent Breakfast Sessions (Select one) 201 Advanced GST 202 Special Needs Trust 203 Off-Shore Planning 204 Trusts as S Corp Shareholders 205 Session to be announced
8:00 am – 12:00 pm	Concurrent Half-Day Sessions (Select one) 19 Advanced Tax Planning for IRA and Qualified Plan Distributions 20 Mock Estate Tax Examination 21 Closely Held Business Succession Planning Refreshment Break and Vendor Display L1 Lunch and Luncheon Speaker Financial Literacy
9:40 am – 10:20 am	
12:00 pm – 1:30 pm	
1:30 pm – 2:20 pm	Concurrent Sessions (Select one) 22 Estate Planning in a Volatile Environment 23 Succession Planning Q&As 24 706 Q&As 25 1041 Preparation (repeat of session 4, continued in session 26) Change Break
2:20 pm – 2:25 pm	
2:25 pm – 3:15 pm	Concurrent Sessions (Select one) 26 1041 Preparation (repeat of session 4, continued from session 25) 27 IRS Update 28 IRA Horror Stories (repeat of session 17) 29 Probate Litigation
3:15 pm – 3:45 pm	Refreshment Break and Vendor Display
3:45 pm – 4:35 pm	Concurrent Sessions (Select one) 30 GRATs v IDITs (repeated in session 36) 31 Planning With Community Property 32 Integrating Asset Allocation In the Estate Plan 33 Advanced 1041 Issues Including Funding Trusts (continued in session 37) Change Break
4:35 pm – 4:40 pm	
4:40 pm – 5:30 pm	Concurrent Sessions (Select one) 34 Circular 230 35 Gifting to Minors 36 GRATs v IDITs (repeat of session 30) 37 Advanced 1041 Issues Including Funding Trusts (continued from session 33)

FRIDAY, JULY 28 MAIN CONFERENCE — DAY THREE

7:00 am – 3:30 pm	Registration & Message Center Open
7:00 am – 8:00 am	Continental Breakfast
7:00 am – 7:50 am	Concurrent Breakfast Sessions (Select one) 206 Private Foundations, Donor Advised 207 IRS Update 208 Succession Planning 209 Reinventing Yourself After Estate Tax Reform 210 Session to be announced
8:15 am – 8:45 am	38 Planning for Art & Collectibles — Ralph Lerner
8:45 am – 9:35 am	39 IRA Update — Bob Keebler
9:35 am – 9:50 am	Refreshment Break

9:50 am – 10:40 am
10:40 am – 12:00 pm
12:00 pm – 1:00 pm
1:00 pm – 1:50 pm
1:50 pm – 2:40 pm
2:40 pm – 3:30 pm
3:30 pm

40 Advanced Charitable Giving — **Conrad Teittel**
41 Funding the Exemption of the Poorer Spouse — **Jonathan Blattmachr**
Lunch
42 FLPs/LLCs — **Stacy Eastland**
43 Non-Qualified Deferred Compensation — **Dave Johnson**
44 Legislative Update — **Ron Aucutt**
Conference Adjourns

Registration information

4 WAYS TO REGISTER FAST

- 1 **ONLINE***: www.cpa2biz.com/conferences
- 2 **PHONE***: 1-888-777-7077 or 1-201-938-3000
- 3 **FAX***: 1-800-870-6611 or 1-201-938-3108
- 4 **MAIL**: Complete and mail the form along with your promotion code to:
AICPA Conference Registration, PO Box 2210, Jersey City, NJ 07303-2210

RECOMMENDED CPE CREDIT

Up to 24 (main conference) and up to 5 (optional sessions)

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.

CONFERENCE FEE

Registration fees are determined by current membership status in the PFP/Tax Section of the AICPA. Please indicate member number on the registration form to obtain the correct discount. Fee for conference includes all sessions, conference materials, continental breakfasts, refreshment breaks, luncheons and reception. Fee for optional workshops includes all session materials and refreshment breaks. Registration for groups of 2 or more individuals per organization may qualify for group discounts. Please visit www.cpa2biz.com/conferences for more information. Groups of 10 or more individuals per organization may qualify for additional discounts, please email service@aicpa.org for more information and indicate "Group Conference Sales" in the subject line of your email. Please note: There is no smoking during the conference sessions.

Suggested attire: Business casual.

Prices and agenda are subject to change without notice.

Program Code: EST06

CANCELLATION POLICY

Full refunds will be issued if written cancellation requests are received by 7/5/06. Refunds, less a \$100 administrative fee, will be issued on written requests received before 7/19/06. Due to financial obligations incurred by AICPA, no refunds will be issued on cancellation requests after 7/19/06. For further information, call AICPA Service Center at 1-888-777-7077.

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. Note, this conference is expected to sell out, so please make hotel arrangements as soon as possible. To receive our special group rates mention that you will be attending the **AICPA Advanced Estate Planning Conference**.

Manchester Grand Hyatt

One Market Place
San Diego, CA 92101
Hotel Phone: (619) 232-1234
Hotel Reservations: 800-233-1234
Hotel Room Rate: \$199 single/double
Hotel Reservation Cutoff Date: June 26, 2006
Ground Transportation — to and from the hotel and airport (please note, rates and times are approximate)

Hotel Parking: Self \$18 per day.
Valet \$24 per day

Taxi Service: from San Diego Airport — \$10 (5 minutes)

Shuttle Service: from San Diego Airport — \$5.00 one way

AIRLINE INFORMATION

The AICPA has a special arrangement with **Carlson Wagonlit Travel — The Leaders Group** to assist you with your travel arrangements. This travel agency may be reached at 1-800-345-5540. 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 1-800-221-2255
Index #18518

Continental Airlines 1-800-468-7022
Agreement Code UNFSLY
and Z code ZRKF

Delta Air Lines 1-800-241-6760
Refer to US723852916

United Airlines 1-800-521-4041
Refer to Meeting ID
#531SI

Due to 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 1-800-654-2240
Ref. Code CV#021H0013.

Airline and car rental discounts are available only when you or your travel agent book through the 1-800 number. We strongly advise you to confirm your conference registration and hotel reservation prior to making your travel plans. The AICPA is not liable for any penalties incurred if you cancel/change your airline reservations. **Rates are subject to availability.**

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 call 201-938-3054 or send your email to exhibit@aicpa.org.

CLE CREDIT

Applications for Continuing Education Credits vary from state to state. Please contact us to see if CLE has been applied for in your state. AICPA Conferences has a financial hardship policy in place. For more information contact AICPA Service Center Operations at CLErequests@aicpa.org.

For up-to-date agenda details, please visit www.cpa2biz.com/conferences