



Estate and Gift Planning Strategies

Why the next 75 days matter

Tuesday, November 8, 2011

11:30 a.m. – 1:30 p.m.

Lunch will be served.

The Center Club

650 Town Center Drive
Costa Mesa, CA 92626

To register for one of the following Roundtable presentations please contact **Meagan Hayes at 949-450-6249 or mhayes@hwcpa.com**.

Online registration is available at www.hwcpa.com

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CERTIFIED PUBLIC ACCOUNTANTS
AND BUSINESS ADVISORS

While we can't predict the future of estate and gift tax laws, the current tax law has presented an excellent environment to review your estate plan, and implement changes to preserve wealth for future generations. An exemption amount of \$5 million has not been seen in our lifetime, and is set to sunset at the end of 2012.

The presentation will include the following topics:

- What action items are important to my estate in the next 75 days
- Why a small gift in 2011 will prove advantageous
- How the following strategies can be implemented into your estate plan
 - QPRT – Qualified Principal Residence Trust
 - GRAT – Grantor Retained Annuity Trust
 - ILIT – Irrevocable Life Insurance Trust
 - Leveraged Gifts
 - CRT – Charitable Remainder Trust
 - Loan Forgiveness
- Latest legal developments presented by Edward Inouye

SPEAKERS:

Marisa E. Alvarado, Director of Estate and Gift Taxation, Haskell & White LLP

Edward S. Inouye, Estate Planning Attorney

1 hour of CE credit will be available.