

PEPNET

Pepperdine Estate Planning Network

2012 CHARITABLE GIVING TECHNIQUES CONFERENCE

David Markun, Kristine Knaplund, Stephanie Buckley, Curt Portzel, Tom Caldwell

Friday, January 20, 2012—Pepperdine University, Malibu Campus, Villa Graziadio Executive Center

8:00 am - 8:50 am

Registration and Continental Breakfast

9:00 am - 9:50 am

Planned Giving - The Technical Aspects

Thomas Caldwell, J.D., M.B.A.

Planned Giving Officer and Legal Counsel, Center for Estate and Gift Planning

In this first session Mr. Caldwell will discuss the basics of planned giving, such as legal requirements for charitable gift annuities and charitable remainder trusts, charitable income tax deductions, and gift and estate tax considerations.

9:50 am - 10:00 am Break

Refreshments provided

10:00 am - 10:50 am Creative Real Estate Sales and Gift Strategies

Curt Portzel, J.D., M.T.S.

Executive Director, Center for Estate and Gift Planning

Mr. Portzel will discuss some of the complications that can arise with gifts of real estate to charitable organizations, and how to safely navigate around them. He will also discuss the use of charitable remainder trusts, charitable gift annuities, charitable gift annuities for home, depreciation, debt, and environmental issues.

10:50 am - 11:00 am Break

Refreshments provided

11:00 am - 11:50 am

Elder Financial Abuse

David Markun, J.D.

Markun, Zusman & Compton, LLP

Mr. Markun will discuss elder abuse including warnings signs of elder abuse, how to recognize and report elder abuse and remedies available.

11:50 am - 1:00 pm Lunch

Lunch provided

1:00 pm - 1:50 pm Lead Trusts In-Depth

Stephanie Buckley, J.D., LL.M.

Associate Vice Chancellor, Center for Estate and Gift Planning

Charitable lead trusts ("CLTs") are an effective tool to transfer wealth while minimizing gift and/or estate taxes. CLTs can also be used to distribute wealth after one's lifetime. In this session Stephanie will discuss how the CLT can be an effective tool in the financial and estate planning process.

1:50 pm - 2:00 pm Break

Refreshments provided

2:00 pm - 2:50 pm The New Biology: What Do Estate Planners Need to Know About Assisted Reproduction?

Kristine S. Knaplund, J.D.

Professor of Law, Pepperdine University

The widespread use of assisted reproduction technologies, including gestational carriers, donated eggs and sperm, and the ability to freeze genetic material or even harvest it after a person's death, presents multiple challenges to estate planners, from the drafting stage to the administration of an estate. Professor Knaplund will discuss what you need to know about assisted reproduction and estate planning.

Earn 5 hours of MCLE/CE

Including one hour of legal ethics credit.

8:00 pm George Winston Live

In addition to the conference, we invite you to relax for the remainder of the afternoon and see George Winston live in concert at 8 pm on campus. George's impressionistic and improvisatory style is subtle yet unmistakable. His talent is not limited to piano prowess, but extends to his ability on Hawaiian slack-key guitar and solo harmonica. Tickets for this event are an additional \$40.

PEPNET

RSVP by Friday, January 13, 2012

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Sponsorship Opportunities Available

Please contact Paul Martello for more information.

REGISTRATION AND PAYMENT

Name _____
Company _____
Phone _____
E-mail _____

Member (\$65)* Non-Member (\$100) George Winston (\$40)

Visa Mastercard

Credit Card # _____

Expiration date _____

Total \$ _____ Checks payable to: *Pepperdine University*

** This conference is in addition to our quarterly PEPNET meetings.*



WHAT IS PEPNET?

PEPNET is a mutual-benefit society sponsored by Pepperdine University for estate planning professionals. This professional organization was created in 1998 by the Center for Estate and Gift Planning to provide quality education for professionals in the estate planning arena and to facilitate a productive and mutually rewarding relationship with its members.

MEETINGS

Members meet three times annually at convenient locations to strengthen their relationships, to network with other professionals, and to participate in continuing education seminars.

MEMBERSHIP

Membership is open to all professions, but is primarily made up of attorneys, accountants, financial planners and consultants, trust officers, and life insurance professionals.

MEMBERSHIP INCLUDES

- ▶ Continuing education credits.
- ▶ Listing in the PEPNET directory (print and on the Web).
- ▶ Access to the PEPNET page on LinkedIn.
- ▶ Weekly e-newsletter with relevant estate planning topics.
- ▶ Ability to network with top estate planning professionals.
- ▶ Parking at PEPNET meetings.
- ▶ Special invitations and priority seating with concierge service at Pepperdine events.

Next Meeting

Newport Beach - February 21, 2012
Brentwood - February 22, 2012

Pepperdine University's Center for Estate and Gift Planning is a State Bar of California MCLE provider. This program has been submitted to the Certified Financial Planners Board for CE credit. Additionally, this program follows the CE regulations as outlined in the California Accountancy Act for Certified Public Accountants. The program is submitted for approval by the State of California's Department of Insurance for five hours of CE credit and is approved for five hours of MCLE credit.

CENTER FOR ESTATE AND GIFT PLANNING

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