

## **Estate & Charitable Gift Planning Institute**

The Salvation Army will once again Sponsor the Estate & Charitable Gift Planning Institute which will be held on

**Wednesday, September 14,  
2011.**

**Please SAVE THE DATE and make plans to attend a location nearest you.**

**CONTINUING EDUCATION CREDITS.** MCLE, CLE, CPE, CFP and CTFA continuing education credits will be earned for attending. Credit hours will vary for Illinois and Iowa. These will be announced at a later date as they become available.

In the past, the seminar was approved for approximately 6-7 Continuing Education Credit hours including 1 hour of ethics.

### **2011 SEMINAR SPEAKERS:**



Ann B. Burns



Charles A. "Clary" Redd

### **2010 SAMPLE AGENDA:**

#### **ETHICS SESSION 9:00 a.m.- 10 Ann B. Burns**

*Ethics and Negligence in Daily Practice:*

The new world of engagement letters.  
Implications from the retention of estate documents.

#### **SESSION I 10:00 a.m.- 11 Ann B. Burns**

*New Cases and Pending Law-Both Enigmas*

Dramatic decisions on irrevocable life insurance trusts.

#### **SESSION II 11:00 a.m.- 12**

#### **Christopher Hoyt**

*Bracing For Future Income Tax Increases*

An examination of the tax rate increases scheduled for 2011

#### **LUNCH 12:00 noon—1:00 p.m.**

#### **SESSION III 1:00 p.m.- 2:40 p.m.**

#### **Christopher Hoyt**

*Defined Value Clauses, Disclaimers & Charitable Bequests Of IRAs*

Simple steps an estate planner can take to easily navigate around  
Legal landmines.

#### **Overview Discussion/Q&A**

**2:40-3:00 p.m.**

**Ann B. Burns & Christopher Hoyt**

**2011 AGENDA will be announced  
as it becomes available.**

**In the past, Satellite and  
Webcast Locations have  
included the following  
cities:**

#### **ILLINOIS:**

- BLOOMINGTON
- PEORIA
- KANKAKEE
- MACOMB
- MORRIS
- OTTAWA
- CANTON
- CHAMPAIGN
- GALESBURG
- SPRINGFIELD

#### **IOWA:**

- CEDAR RAPIDS
- CLINTON
- WATERLOO
- QUAD CITIES

***For information about  
hosting a site please  
contact:***

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## The Salvation Army

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### ***Mission Statement***

*The Salvation Army, an international movement, is an evangelical part of the universal Christian church. Its message is based on the Bible. Its ministry is motivated by the love of God. Its mission is to preach the gospel of Jesus Christ and to meet human needs in His name without discrimination.*

**PLEASE SAVE THE  
DATE!**

*The Salvation Army Presents:*

## **The 19th Annual Estate & Charitable Gift Planning Institute**

**Wednesday,**

**September 14, 2011**

**“Estate Planning with a  
Foggy Crystal Ball”**

**Presented by:**

**Ann B. Burns and**

**Charles A. “Clary” Redd**

**Broadcast live from**

**Minneapolis to:**

**A LOCATION NEAR**

**YOU!**