

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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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!