The Gathering 2006

Let's gather together to share insights, education and collegiality. The Gathering is a yearly event primarily for advisors in Estate and Business Planning. In today's complex world, no one person can be an expert in all areas of estate, business, tax, and wealth planning.

The format of these two-day workshops is designed for team-teaching in an informal setting, where dialogue and participation with the audience is as important as the materials prepared by the presenters. The presenters are selected because they are experts in their field who enjoy teaching and who give of themselves and their time. Their unique skills, experience, expertise and judgment are truly invaluable to the audience and are extraordinarily well-received!

Keynote Speaker:
Jonathan Blattmachr, Esq.

Moderators:
David Cahoone, Esq., and Joseph Strazzeri, Esq.

Dates:
February 2nd and 3rd

Participation Fee:
$500.00

Program Location & Accommodations
Sheraton San Diego Hotel & Marina
1380 Harbor Island Drive
San Diego, California 92101
Phone (619) 291-2900

Southern California Institute Room Rate:
$189 single or double occupancy

To Attend:
Please RSVP by calling (858) 200-1911 or
e-mail: events@scinstitute.org.
For more information on The Gathering
please visit our website at www.scinstitute.org

Southern California SCInstitute

AWSI
Advanced Wealth Studies Institute, LLC

The Gathering
Schedule of Events

Thursday, February 2nd, 2006

8:15 am - 8:30 am **Welcome and Introduction of Jonathan Blattmachr**
David K. Cahoone, Esq.

8:30 am - 11:00 am **Recent Developments That Affect Wealth Planning. Jonathan Blattmachr, Esq.**

The nationally renowned estate planning attorney, author and lecturer will bring us up-to-date with the most recent developments in the financial, income, gift and estate planning arenas. Don't miss this great opportunity to personally experience this tremendous presentation.

11:00 am - 11:30 am **Break**

11:30 am -12:30 pm **The Guest/Client Experience**
Stephen J. Mancini, Esq. and Keikilani Kainoa, Director of Guest & Culture Relations – Marriott Hotels

Whether at an elegant and peaceful Hawaiian resort, a rodeo, or a wealth planning/management professional's office – the Guest/Client will have an experience. Unfortunately it is often disappointing for all. The goal is to create the best possible experience that predisposes individuals and families to enjoy and appreciate; and to encourage repeat business and referrals. Steve and Keikilani will discuss how details and nuances are important – and will use case examples to help us create our own intentional client experience.

12:30 pm - 2:00 pm **Lunch**

2:00 pm - 3:30 pm **The Power of Collaboration and "Shining the Light" Maureen Verduyn, CFP®, MEd, William C. Fortner, Life Wholesaler & Project Manager, John L. Jenkins, CFP®, Joseph J. Strazzeri, Esq., David K. Cahoone, Esq. and a cast of others**

This experienced and diverse group will discuss how to play together in the sand box as professionals to provide more value to our clients.

3:30 pm - 4:00 pm Break

4:00 pm - 5:00 pm **Creative Wealth Transfer Techniques**
Danniel J. Wexler, Esq., and Peggy R. Lombardo, CFP®, EA

Danny and Peggy will present an actual case study showing new ideas in wealth transfer. The goal: to allow high income high net worth clients to accumulate and transfer wealth in a tax advantaged manner. All this using conservative legal methods and established tax laws. They will walk you through the case study explaining the reasoning behind each step from both a legal and tax perspective.

6:00 pm - 11:00 pm **"Circle of Friends" Black-Tie Optional Charity Event**

This evening the Southern California Institute will host our "Circle of Friends" Brazilian Carnivale, to benefit the Muscular Dystrophy Association. Join us for cocktails, dinner, dancing, silent & live auctions, and casino style gaming.

Friday, February 3rd, 2006

9:00 am - 10:30 am **Sifting through what's new and making it "practical & relevant" to integrate it into the planning we do for our clients.**
David K. Cahoone, Esq., John Donaldson, Esq., and Carol Schaner, Esq.

Our third annual current developments program will focus on what's going on with recent cases, cutting edge strategies and administrative concerns that are new and relevant to our practices and to our clients. The session will include a briefing on a sense of what was important to the thousands of attorneys, financial advisors, life insurance professionals and CPAs who attended the 40th annual Heckerling Institute on Estate Planning in January 2006.

10:30 am - 11:00 am **Break**

11:00 am - 12:30 pm **Nevada Series LLC, The New Kid on the Block.**
Scott Gunderson, Esq., and Kelly Swansen, Esq.

Discussion of the power and planning opportunities using the newly available Nevada Series Limited Liability Companies for clients in all states who are seeking asset protection as well as streamline planning opportunities.

12:30 pm - 2:00 pm **Lunch**

2:00 pm - 3:00 pm **Ethics in Professional Practices**
Peter Myers, Esq., and Kimberly Lee, Esq.

Let's face it: ethics rules - conflict of interest, civil liability exposure, and confidentiality - are boring. They are also essential and education on their application is required by all disciplines. We'll spice up this topic with some interesting and entertaining hypotheticals, and we will examine how the ethics rules apply in the context of working together in an interdisciplinary environment.

3:00 pm - 4:00 pm **Current Developments in Retirement Planning and Beneficiary Designations**
Scot Overdorf, Esq., and Jeffrey Dundon, Esq.

The landscape of integrating retirement plans into the estate planning process is constantly changing. Jeff and Scot will review the significant private revenue rulings issued over the last few years and the planning pitfalls and opportunities. In addition, they will discuss how to qualify trusts for designated beneficiary status in order to meet your client's estate planning goals.

4:00 pm - 5:30 pm **The California Hour – A Review of Interesting and Relevant Provisions of the Probate Code**
W. Vito Lanuti, Esq., and Susan A. Katzen, Esq.

Join veterans Vito and Susan as they focus on the nuances of California law. Each year the Gathering presents the "California Hour" which focuses on sections of the California Probate Code that are important to your every day practice. Employ opportunities, avoid pitfalls, and increase your depth at this informative and practical session.

5:30 pm - 7:00 pm **Cocktails with Friends and Colleagues**

Sheraton San Diego Hotel & Marina