The Gathering 2009

For Business and Wealth Advisors

Let's gather together once again to share insights, education and collegiality. The Gathering is an annual event for all advisors in Estate, Business and Wealth Planning. In today's busy world, no one person can be an expert in all areas of estate, business, tax, and wealth planning. However, as we gather and work together we can, through collegiality and collaboration, provide the leadership our clients are seeking to offer clarity and direction to their planning needs.

The format of the two-day Gathering is designed to engage all participants in an informal team teaching setting, where dialogue and audience interaction is as important as what is communicated from the front of the room. The presenters are each 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 when blended with the incredible breadth and depth of talents and experience of the attendees.

Keynote Speaker:

David K. Cahoone, Esq.

Moderators:

Joseph J. Strazzeri, Esq. and Stephen J. Mancini, Esq.

Dates:

Thursday, February 26 and Friday, February 27, 2009

Participation Fee:

$520

Program Location and Accommodations

Hyatt Regency La Jolla
3777 La Jolla Village Drive
San Diego, California 92122
Phone: 1-858-552-1234
Toll Free: 1-800-233-1234

Southern California Institute Room Rate:
$169 single or double occupancy

Room Rate Cut-Off Date:
January 31st, 2009

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 26th, 2009

8:15 am - 8:30 am — **Welcome and Overview of the Days and Nights of The Gathering,** David K. Cahoone, Esq., Stephen J. Mancini, Esq., and Joseph J. Strazzeri, Esq.

8:30 am - 10:00 am — **What's New in Estate and Wealth Transfer Planning** David K. Cahoone, Esq., and Friends, including Carol Schaner, Esq., John Donaldson, Esq., Scot Overdorf, Esq. and other planning experts

Our fifth annual current developments program will focus on the new planning issues and opportunities that will impact our financial advisor, CPA, insurance professional, trust officer and attorney practices. In a lively, highly-interactive session we will share those things that are practical and relevant in 2009 and beyond that will bring real value to our clients as we learn together what's new, what we didn't know, and what has changed from what we thought we knew.

10:00 am-10:30 am — **Break**

10:30 am-12:00 pm — **Special Needs Trust Planning for Affluent Families** Diedre Wachbrit, Esq., and Kevin Urbatsch, Esq.

Do you think special needs planning is poverty planning? These two national authors and practitioners will review why even the most affluent families should consider special needs planning for their children and grandchildren with disabilities. Learn the ins and outs and practical know-how to help these families. The right special needs plan leaves your client families with added security and your firm with higher revenues.

12:00 pm - 1:30 pm — **Sponsored Lunch; Marketing – The Power of Image for Wealth Advisors** Mark Merenda, Kimberly Lee, Esq., and Jan Copley, Esq.

Mark Merenda of Smart Marketing will present evidence to support an outrageous contention: that, in today's volatile market, when it comes to growing your practice how you look might be just as important as your professional skills. Smart Marketing clients, Kimberly Lee and Jan Copley, will describe their experiences over the past few years in "growing a brand."

1:30 pm - 3:00 pm — **The Laureate Hour – The Introductory Visit** Marc Selden, Esq., and Rick Abbondanza, Esq.

Learn how to set the tone to close the case with affluent families. Understand the possibilities through the Laureate "Memorandum of How to Conduct the Introductory Visit" – a reverse engineered checklist for success. Plus overview: Setting the Stage, Setting Expectations, and Your Process as Your Product.

3:00 pm - 3:20 pm — **Break**

3:20 pm - 5:00 pm — **The Frozen T-CLAT** Vinnie Bonazzoli, Esq., and Carol Schaner, Esq.

Learn how to present, design and implement a Frozen T-CLAT and the differences from a traditional T-CLAT "zero estate tax" plan. Understand how The Frozen T-CLAT is a simple, straight forward, and powerful technique that eliminates Federal Estate Taxes, allows the family access to funds immediately after the Trustmaker's death, creates dynasty trust opportunities, and requires virtually no administration burden during life for your high net worth clients.

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

Come join us on this night where The Southern California Institute will host our "Circle of Friends" Gala. This annual event is an appreciation night for Laureates and Members of the Institute, as well as their families, clients, and friends. This year's Mardi Gras-themed event will be an elegant evening offering cocktails, dinner, music, live auctions, and casino-style gaming. Dress is "black-tie optional" and costumes are encouraged. All proceeds will benefit the Autism Discovery Institute, Diagnostic and Treatment Center at Children's Hospital.

"Circle of Friends" Charity Event

Friday, February 27th, 2009

9:00 am - 10:15 am — **How Community Property Law Affects You and Your Practice, Even Though You Think it Doesn't?** Jan Copley, Esq., and Brad Wiewel, Esq.

For those of us from, and not from, community property states, it's probably time to bone up on this area of the law. Think about it – every fourth person in the United States lives in a community property jurisdiction and three out of four do not! If you ignore this, you may unwittingly deprive your clients of substantial income tax benefits and create unnecessary and unwanted gift tax consequences for them. Jan and Brad will also cover how community property intersects with life insurance planning.

10:15 am - 10:45 am — **Break**

10:45 am - 12:00 pm — **In 2009 – Who Should Be the Beneficiary of Your IRA?** Carol Gonnella, Esq., and Cecil Smith, Esq.

Learn, understand, and integrate into your practice proper retirement plan beneficiary designations. Carol and Cecil will share with us how to help your clients through income tax savings, asset protection, control, and maximized leverage planning for, and administering of, one of your clients' largest assets.

12:00 pm - 1:15 pm — **Laureate Lunch – An Overview of The Laureate in Wealth Strategies Program**

This lunch program is designed and intended for all attendees of The Gathering. For our 2009 Laureate Students it will serve as the introduction and overview to The Laureate Program. For participants of The Gathering, who are not yet part of The Laureate Program, it will serve as a guest opportunity for more information, insight, and a glimpse into the "World of the Laureate."

1:30 PM – 2:30pm — **When Family Law Runs into Estate Planning** Lynne W. Lugar, Esq., and David Hiersekorn, Esq.

As wealth advisors, understand how filing for divorce, becoming separated, or getting married can cut off certain planning opportunities, create opportunities, or create traps for the unwary. Think beyond the ordinary as an advisor who identifies, plans for, and resolves these tax, asset protection, estate planning, and financial planning issues.

2:30 pm- 3:00 pm — **Break**

3:00 pm – 4:00 pm — **Great Opportunities — QPRT Planning in Today's Market** Guy Jackson, Esq., and Vinnie Bonazzoli, Esq.

When structured and implemented properly, QPRTs are a great opportunity for today's mid-tier planning clients with temporarily depressed home values. However, successful design and implementation of a QPRT requires multiple levels of understanding and knowledge. Learn the pitfalls, possibilities, and control issues for today's clients.

4:00pm – 5:00pm — **California Developments: The Probate Code and Case Law** Susan Katzen, Esq., and W. Vito Lanuti, Esq.

Vito and Susan will lead us through important sections of the probate code and recent changes in California trust and trust administration law. You will find this presentation highly relevant to your every-day California financial and/or legal practice.

1:30pm – 5:00pm — **Laureate in Wealth Strategies Session One: For Laureate Students**

All Laureate Students will share in this separate afternoon program and will also participate in an all-day Saturday program as part of The Laureate in Wealth Strategies (LWS), The Laureate in Advanced Wealth Strategies (LAWS), and The Laureate Circle (LC) – Session One.

5:00pm - 7:00pm — **Relaxing and Sharing with Friends and Colleagues**

Come join to share collegiality with other Gathering participants and Laureate Members at Michael's Lounge, located inside the Hyatt Regency La Jolla.