Please join us for our 13th annual Gathering for two days of shared insights, education, and collegiality. The Gathering is an annual event for all advisors in Estate, Business, and Wealth Strategies Planning. As we gather and work together we can, through collegiality and collaboration, provide the leadership our clients are seeking to offer clarity and direction for their planning needs.

The format of the two-day Gathering is designed to engage all participants in a conversation where audience interaction is as critical as what is communicated from the front of the room. The presenters are each experts in their field who enjoy sharing and who give of themselves and their time. Their unique skills, wisdom, and judgment are truly invaluable when helping clients fulfill their enlightened dreams.

Keynote Speaker:  
David K. Cahoone, Esq.  

Moderators: 
Steve Mancini, Esq. and Joe Strazzeri, Esq.

Program Location and Accommodations:  
San Diego Marriott La Jolla | 4240 La Jolla Village Drive | San Diego, California 92037  
(858) 587-1414

“The Gathering” Room Rate:  
$169 (Reserve your room by February 3, 2017)  
(look for reservation link at www.2017Gathering.com)

Dates and Times:  
Friday, February 24, 2017  
7:00am – 8:00am  Registration, Breakfast, Meet the Presenters and Sponsors  
8:00am – 4:30pm  General Session  
5:30pm – 11:00pm  Circle of Friends Roaring Twenties Charity Gala  
Saturday, February 25, 2017  
7:30am – 8:00am  Check-in and Breakfast  
8:00am – 5:15pm  General Session  
5:15pm – 6:30pm  Networking Reception with Presenters

Participation Fee:  
The Gathering - $420  
Circle of Friends Only - $200 (waived with the Gathering fee)

Continuing Education Credits:  
CFP & CA Insurance – credits applied for  
CPA & MCLE (approved provider #11857) - credits offered

To Attend:  
Register on-line at www.2017Gathering.com, or call 858-200-1911
The Gathering 2017 Agenda - Day One

Friday, February 24: General Session, Day 1

7:00am – 8:00am Registration, Breakfast, Meet the Presenters and Sponsors

8:00am – 8:10am Opening

8:10am – 9:30am Current Developments Affecting Our Planning; Presented by David K. Cahoone, Esq.
Wow, what a difference a year makes. Our 13th annual Current Developments Session will be like none other before it - as we share relevant insights and fresh perspectives 30+ days into the new Trump Administration. We’ll spotlight the anticipated massive legislative initiatives expected in the first 100 days and the first six months of the new Administration - focusing on the most relevant topics of conversation and planning opportunities for advisors of all disciplines to share with clients and prospective clients. Finally, we’ll examine how true collaboration among a team of advisors is even more important in the 2017 maelstrom to help our clients discover and implement a critical path to implement their Enlightened Dreams™.

9:30am - 10:00am Break

10:00am – 10:50am The Case for Baby Boomer Clients in Your Practice; Presented by Scott Stewart, Esq. and Brooke Jensen, Esq.
As society ages the need for services by this demographic are going to increase. This can include planning for long-term care, Medicaid, Medi-Cal, and other government benefits, leading to a dramatic increase in the amount of probate, trust administration, settlement and the associated financial, tax, and legal planning for clients older (and younger!) than 55. Join Scott and Brooke as they share techniques, tools, and their technical expertise to enhance your knowledge and practice.

10:50am – 11:40am Savvy Social Security Planning: What CPAs, Attorneys, and Other Professionals Need to Know About Social Security Claiming Strategies; Presented by Ryan Hyslop with the Sierra Pacific Group and Kelsey Regedanz with the Pangea Group
Discussion topics include: Fundamental changes to the Social Security system enacted by Congress in early 2016 and how to maximize lifetime benefits. Navigating the complex World of Social Security and the various questions you will face from clients on the earnings test, actuarial reduction, delayed retirement credits, full retirement age, primary insurance amount, survivor benefits, and income optimization.

11:40am – 12:30pm What Every Estate Planner Should Know About International Planning; Presented by Jonathan A. Mintz, Esq.
The U.S. is currently the “Switzerland” of years past, and more and more wealthy non-U.S. persons are investing in moving to the U.S. However, absent planning, these individuals will be unnecessarily subject to significant U.S. income and transfer tax. Jonathan will discuss the increasing importance of the rules surrounding typical international client scenarios, planning options, and traps for the unwary.

12:30pm – 1:50pm Sponsored Lunch

1:00pm – 2:40pm Charitable Planning - Partnering with “Your” Charity; Presented by R.J. Kelly, ChFC®, CLU®, IAR, RICP®, MSFS, and Elise Webster, Director of Planned Giving
Clients understand passion, intent, and transformational charitable giving. R.J. and Elise will review the technical options as well as the soft side that drives client satisfaction and implementation in the balance of your plan. Learn and understand the financial, tax, legal, and client impact of today’s charitable giving options.

2:40pm – 4:20pm Mistakes & Lessons - Marketing and Practice Management; Presented by Shelley Lightfoot and Partner Experts
Join Shelley and friends as they share practical tools to launch your practice into the next generation with social media mastery, client conversion strategies and tracking, and your dream cloud software package in the clouds. Find out how to make it (and how not to) all flow and work together like a fine-tuned machine!

4:00pm – 4:30pm Cloud Based Software - Everything You Always Needed and Wanted; Presented by Ali Mirdamadi and Tomas Suros with Abacus Next
Practice Management is silly and insane without an integrated, easy, and usable cloud-based CRM with forms/process capability, tracking, emails, scheduling, To-Do’s, case management, and all that other stuff in one place – where the transition is managed by an expert team and not your staff. Join our friends Ali and Tomas to make sense of the decision you have to make. NOTE: We moved from Time Matters!

4:30pm – 6:00pm Lead Conversion - Campaigns, Tagging, Freemiums, Client Lifecycles - What’s it all about? Presented by Darin Adams with Infusionsoft
How much revenue do we each lose from the point of a client (and advisor) interest, to them dropping off our scope? Lost opportunity is loss of pure profit. Darin will explain how to use potential client conversion software while remaining profitable and professional.

5:30pm – 11:00pm Circle of Friends “Roaring Twenties” Gala
See below for details or visit www.2017Gathering.com

Join Us For Our Annual
Circle of Friends “Roaring Twenties” Charity Event
Friday Evening, February 24, 2017, 5:30pm - 11:00pm
San Diego Marriott La Jolla

Also register for this night where The Southern California Institute will host our Circle of Friends “Roaring Twenties” Gala. This annual event is an appreciation night for Larueates and Members of the Institute, as well as their families, clients, and friends. This year’s event will be an elegant evening offering cocktails, dinner, music, live auctions, dancing, and casino style gaming. Dress is “roaring twenties/black-tie optional” and costumes are encouraged. All proceeds will benefit autism research at Rady Children’s Institute for Genomic Medicine.

Register (as part of your Gathering registration and fee) online at www.2017Gathering.com
Saturday, February 25: General Session, Day 2

7:30am – 8:00am  Check-in and Breakfast

8:00am – 8:10am  Opening

8:10am – 9:00am  Dissecting Exit Planning & the Value Acceleration Methodology - How to Use Them to Enhance Your Practice and Reach Your Clients; Presented by Scott Snider, VP, Exit Planning Institute

9:00am – 9:50am  The Bespoke Protector: Tailoring Third Party Powers to a Strategy's Demands; Presented by Matt McClintock, JD, TEP

9:50am – 10:20am  Break

10:20am – 11:10am  Family Business: Recognizing the Areas of Conflict at the Intersection of Family, Ownership, and Management; Presented by Emily Bouchard, MSSW

11:10am – 12:00pm  The Renaissance in Estate/Financial Planning and Taxation - Tweaking and Re-doing the “Alphabet Soup”; Presented by William Conway, Esq. and Jessica Pannell, Esq.

12:00pm – 1:20pm  Sponsored Lunch

1:20pm – 2:10pm  Reporting Elder Abuse: Should I? Must I? Or Must I Not?; Presented by Peter Myers, Esq. and Sheila K. Robello, Esq.

2:10pm – 3:00pm  Taking it Home; Presented by Steve Mancini, Esq., David K. Cahoone, Esq., and Joe Strazzieri, Esq.

3:00pm – 3:20pm  Break

3:20pm – 4:10pm  Understanding Exit Options: What Advisors Need to Know

4:10pm – 5:00pm  Dissecting Buy/Sell Agreements - Legal, Technical, and Valuation Perspectives; Presented by Melisa Silverman, JD, CEPA, CVA, SBA, CMEA and Alex Matuk, Esq.

5:00pm – 5:15pm  Networking Reception with Presenters (Must be present to win drawing for 50% off the Laureate Center's technical CWSA program May 2nd – 6th)

5:15pm – 6:30pm  What should you do – and what can you do - with existing life insurance burial in ILITs, Buy/Sell agreements, and other wealth transfer entities in the new tax world? Learn from case studies and review the true numeric comparisons considering taxation, growth, and cash flows to help clients and their advisors understand their options.

Sponsorship Opportunities Available
Please call Shelley at 858-200-1911
The Gathering 2017 Presenters

Darin Adams, Professional Speaker, Infusionsoft; www.infusionsoft.com

Emily Bouchard, MSSW, Managing Partner, Wealth Legacy Group; www.wealthlegacygroup.com

David K. Cahoone, Esq., Principal, David K. Cahoone, PA; Of Counsel, Johnson, Browning, and Clayton; Co-Owner, Laureate Center for Wealth Advisors; www.laureatecenter.com

William Conway, Esq., Partner Attorney, Conway & Pannell; www.conway-pannell.com

Dean DeLisle, Founder/CEO, Forward Progress; www.forwardprogress.net

Sean Hutchinson, CMAA, CEPA, CEO, Strategic Value Advisors; www.eliteadvisorsalliance.com

Ryan Hyslop, First Vice President, Financial Advisor, Portfolio Manager, The Sierra Pacific Group at Morgan Stanley; www.morganstanleyfa.com/spg

K. Brooke Jensen, Esq, California Estate and Elder Law, LLP; www.estate-elderlaw.com

R.J. Kelly, ChFC®, CLU®, IAR, RICP®, MSFS, Founder and Chief Visionary Officer, Wealth Legacy Group; www.wealthlegacygroup.com

Shelley Lightfoot, Executive Director, Southern California Institute; www.scinstitute.org


Alex Matuk, Esq., Of Counsel to Strazzeri Mancini, LLP; California Estate and Elder Law LLP; and Garmo & Garma LLP

Matt McClintock, JD, TEP, Vice President of Education, WealthCounsel; www.wealthcounsel.com

Jonathan Mintz, Esq., Partner, MVM Law; www.mvmlawyers.com

Ali Mirdamadi, Sr. Business Development Manager, Abacus Data Systems; www.abacusnext.com

Addie Murdock, Senior Director of Global Accounts, The Burgess Group; www.tbgroup.org

Peter Myers, Esq, Fox Rothschild LLP; www.foxrothschild.com

Jessica Pannell, Esq., Partner Attorney, Conway & Pannell; www.conway-pannell.com


Sheila K. Robello, Esq, Partner, Solen, Park & Robello; www.solenpark.com

Melissa Silverman, JD, CEPA, CEVA, SBA, CMEA, President, Avenue M Advisors, Inc.; www.avemadvisors.com

Scott Snider, CEPA, Vice President, Exit Planning Institute; www.exit-planning-institute.org

Scott Stewart, Esq., Managing Partner, California Estate and Elder Law, LLP; www.estate-elderlaw.com


Tomas Suros, Chief Solutions Architect, Abacus Law; www.abacusnext.com

Elise Webster, Director of Planned Giving, Rady Children’s Hospital Foundation; www.radyfoundation.org

K. Brooke Jensen, Esq., California Estate and Elder Law, LLP; www.estate-elderlaw.com

R.J. Kelly, ChFC®, CLU®, IAR, RICP®, MSFS, Founder and Chief Visionary Officer, Wealth Legacy Group; www.wealthlegacygroup.com

“Achieve quiet confidence to work with wealth families while practicing profitability, efficiently, and with passion.”

- David K. Cahoone

Contact us today to find out if the Laureate Program is right for you.

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