Laureate Center *for* Wealth Advisors

The Gathering 2019
San Diego, California

Family Wealth and Business Succession

14
Critical and Thought Provoking Topics

26
Thought Leader Experts

9
Different Disciplines

14
CE Hours (MCLE)
(CPA, CFP and DOI applied for)

70's Themed Party
Unforgettable Memories
Lifelong Friends

Southern California SCInstitute

Rady Children's Hospital San Diego Autism Discovery Institute

Go to
www.scinstitute.org/Gathering-2019 for details!

Please join us for our 15th 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 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. With our ***Thought Leader Community*** as your resource, you don't have to master the answer to every client quandary. Instead you become courageously armed with the right questions and resources. *This We-driven mindset is transformational for you, your practice, and your clients.*

Keynote Speaker:
Day 1: Peter Myers, Esq. and Steve Mancini, Esq.
Day 2: Chris Snider and Scott Snider, Exit Planning Institute

Moderators:
Shelley Lightfoot and Joe Strazzeri, Esq.

Program Location and Accommodations:
San Diego Marriott Del Mar | Main Ballroom
11966 El Camino Real | San Diego, California 92130
(858) 523-1700

"The Gathering" Room Rate:
$169; Reserve your room by February 1, 2019
(look for reservation link at www.scinstitute.org/Gathering-2019)

Dates and Times:
Thursday, February 21, 2019 - *Tax and Estate Planning Day*

7:00am - 4:30pm	Registration & General Sessions
5:30pm - 11:00pm	Circle of Friends Charity Gala benefiting Rady Children's Hospital Autism Discovery Institute

Friday, February 22, 2019 - *Business and Succession Planning Day*

7:30am - 5:15pm	Check-in & General Sessions
5:15pm - 6:30pm	Reception

Participation Fee: Both Days - $420 (includes Gala); One Day - $260

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

To Attend:
Register on-line at www.scinstitute.org/Gathering-2019, or call 858-200-1911

The Gathering 2019
Topics and Speakers

Day One Agenda
Tax and Estate Planning

7:00am - 8:00am	Registration, Breakfast, Meet the Presenters and Sponsors
8:00am - 8:10am	Opening Remarks
8:10am - 9:10am	KEYNOTE: Hot Topics for 2019 ***presented by Peter Myers, Esq. and Steve Mancini, Esq.***
9:10am - 9:40am	Break
9:40am - 10:30am	Qualified Opportunity Zones - Advanced Techniques for Building Tax - Free Wealth ***presented by Greg Banner, CFP®, CLU®, CRTP and Aman Badyal, Esq.***
10:30am - 11:20am	Competency and Risk - Are You Liable? ***presented by Dr. Michael G. Plopper and Scott Stewart, Esq.***
11:20am - 12:10pm	The ABLE Act and SNT Taxation Issues for the Financial/Estate Planning Practitioner ***presented by Stephen Dale, Esq.***
12:10pm - 1:30pm	Sponsored Lunch - Ultimate Estate Planner
1:30pm - 2:20pm	What's Old is New Again - Insurance Planning Under the New Tax Law ***presented by Trey Fairman, JD, LL.M. and Ryan Barradas, CLU®***
2:20pm - 3:10pm	Essential Estate Planning Considerations During the Divorce Process ***presented by Joseph Matuk, Esq. and Veronica Lopez, Esq.***
3:10pm - 3:30pm	Break
3:30pm - 4:20pm	The Ins and Outs of Charitable Gifting in Today's World ***presented by Kimberly Vawter, JD and Elise Webster***
4:20pm - 4:30pm	Taking it Home ***presented by Joe Strazzeri, Esq. and Shelley Lightfoottt***
5:30pm - 11:00pm	

Day Two Agenda
Business and Succession Planning

7:30am - 8:30am	Check-in and Breakfast
8:30am - 8:40am	Opening Remarks
8:40am - 9:40am	KEYNOTE: Fishing for Value - An Exit Planning Case Study ***presented by Chris Snider and Scott Snider***
9:40am - 10:10am	Break
10:10am - 11:00am	Panel Discussion with Business Owners in Various Stages of Exit - Keep, Transition, or Sell...and How? ***moderated by Joe Strazzeri, Esq.***
11:00am - 11:50am	The Case for Nevada Trusts for Non-Resident Business Owners ***presented by Rebecca Haines, Esq., Joe Strazzeri, Esq. and Cody Parks, Esq., LL.M***
11:50am - 1:20pm	Sponsored Lunch
1:20pm - 2:10pm	The Anatomy, Choices, and Litigation Landmines of ESOPs ***presented by Melisa Silverman, JD, CEPA, CVA, SBA, CMEA and Chelsea Mikula Tomko, Esq.***
2:10pm - 3:00pm	New Tax Rules for You and Your Business Owners including 199A, QSBS, etc. ***presented by Keith Troutman, CPA and Laura Stees, CPA***
3:00pm - 3:20pm	Break
3:20pm - 4:10pm	Business Owner Disability - A Trustee's Perspective on Transitioning a Family Business in the Face of Key Person Incapacity ***presented by Sharon Buck, CFP®, CPWA, EA, ChFC, CTFA, CEPA, ADFA, CLU, TEP and Ann Rosevear, JD***
4:10pm - 5:00pm	Business & Real Estate Opportunities to Partner with Foreign Companies & Investors ***presented by Robert Garmo, Esq. and Freddy Garmo, Esq.***
5:00pm - 5:15pm	Taking it Home ***presented by Joe Strazzeri, Esq. and Shelley Lightfoot***

Go to www.scinstitute.org/Gathering-2019 for a detailed agenda or to register!