



# The Gathering 2020

## San Diego, California

### *The Power of "We"*

### *Family Business Wealth, Conflict, and Transition Planning Resources*

**26**  
**THOUGHT LEADER EXPERTS**

**10**  
**DIFFERENT DISCIPLINES**

**14**  
**CE HOURS (MCLE)**  
(CPA, CFP AND DOI APPLIED FOR)

**14**  
**CRITICAL AND THOUGHT PROVOKING TOPICS**

- **Keynote:** 2020 Update on Taxation, Asset Protection, & Case Law
- Good Things Come in Threes - Modern Day Income Tax Savings Using Qualified Plans
- The Elements and Dissection of a \$100 Million Sale
- The Power of Nevada Planning for Business Owners
- EPI-Gathering 4 Power Talks: *The Collaborator, The Closer, The Influencer, and The Counselor*
- Adding Exit Planning to Your Practice - Choose, Develop, Implement, and Maintain
- Buy/Sell Agreement Disasters
- **Keynote:** Helping Affluent Families Avoid or Resolve Conflict
- Business Succession – Three Divergent Owner Perspectives (Business Owner Panel)
- Case Studies for Business Owner Innovative Tax Planning
- When the Business Includes Real Estate During a Sale – Options and Dangers
- Due Diligence Pre-Planning – Making Sure The Sale Does Not Derail
- Crisis Financial Implementation for the “Ailing” Entrepreneur
- Marijuana, Hemp, CBD, Health, Business, Investments – Oh My!



**Exit Planning Institute**



Please join us for our 16th annual Gathering for two days of shared insights, education, and collegiality. The Gathering is an annual event for all advisors in Tax, Wealth, Business, and Estate 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 Jay Adkisson, Esq.

Day 2: Joe Strazzeri, Esq. and Carmen Bianchi, Family Business Counselor

#### **Moderators:**

Joe Strazzeri, Esq. and Shelley Lightfoot, CEPA

#### **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:**

\$174; Reserve your room by February 7, 2020

(look for reservation link at [www.scinstitute.org/Gathering-2020](http://www.scinstitute.org/Gathering-2020))

#### **Dates and Times:**

Thursday and Friday, February 27 & 28, 2020

7:00am - 5:30pm

Registration & General Sessions

5:30pm - 11:00pm

Circle of Friends Charity Gala benefiting

Rady Children's Hospital Autism Discovery Institute

*(Thursday Evening)*

**Participation Fee:** Early Bird \$420; After Jan. 15 \$520 (includes Gala)

#### **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-2020](http://www.scinstitute.org/Gathering-2020), or call 858-200-1911

**Go to [www.scinstitute.org/Gathering-2020](http://www.scinstitute.org/Gathering-2020) for details!**



# The Gathering 2020

## THOUGHT LEADER EXPERTS



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**Jay Adkisson, Esq.**  
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Go to [www.scinstitute.org/Gathering-2020](http://www.scinstitute.org/Gathering-2020) for a detailed agenda or to register!

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