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SPECIAL THANKS TO THE HOPEWEST GRAND JUNCTION PLANNED GIVING COUNCIL

HopeWest
3090 North 12th Street, Unit B
Grand Junction, CO 81506

EDUCATION SEMINAR
for Estate Planning Professionals
September 17, 2019
REGISTRATION INFORMATION

12th Annual

ESTATE PLANNING SEMINAR

Presented by HopeWest
IN COOPERATION WITH
Colorado West Estate Planning Council

Tuesday, September 17
Colorado Mesa University
Meyer Ballroom
8:00 a.m. - 5:00 p.m.

2019 Estate Planning Topics
CE Credits Available

This day of learning highlights the most recent developments and planning opportunities for professionals; encourages intellectual growth; addresses technical and ethical topics encountered in your advisory relationships; and is designed to be valuable to all members of a client's professional advisory team.

REGISTRATION

Register at HopeWestCO.org

Registration Fees

$250 – 1st attendee

$200 – 2nd attendee / same firm

10% discount for current members of
Colorado West Estate Planning Council

CE Credits Available

CMU parking passes will be emailed prior to event.

**Questions? Call Joyce at (970) 255-7269
or email JLambert@HopeWestCO.org.**

FEATURED SPEAKER

See more speaker bios at HopeWestCO.org.

Christopher R. Hoyt

Christopher Hoyt is a Professor of Law at the University of Missouri (Kansas City) School of Law where he teaches courses in the area of federal income taxation, charitable organizations and retirement plans.

Previously, he was with the law firm of Spencer, Fane, Britt & Browne in Kansas City, Missouri. He received an undergraduate degree in economics from Northwestern University and he received dual law and accounting degrees from the University of Wisconsin.

Professor Hoyt is the Vice-Chair of the RPTE Charitable Group and he serves on the editorial board of Trusts and Estates magazine. He is an ACTEC fellow and has been designated by his peers as a "Best Lawyer." He was elected to the Estate Planning Hall of Fame by the National Association of Estate Planners & Councils.

8:00 a.m. - 8:30 a.m.	**Breakfast**
8:40 a.m. - 11:30 a.m. **GROUP SESSION** *20 min. break included*	**IRAs in 1st & 2nd Marriages: The Fun Begins,** *Christopher R. Hoyt* Types of Qualified Retirement Plans, Divisions, Distributions, Transfers at Death, Tax Planning **Lifetime Charitable Tax Planning with Retirement Assets** The 2017 tax legislation made it harder for people to itemize their deductions and get tax savings from charitable gifts. Participants will learn the best ways to get tax savings from charitable gifts under the new rules. **Estate Planning for Retirement Assets, Especially for Charitable Uses** How charitable bequests of retirement assets, when properly structured, can reduce the income tax liability of a trust, an estate, and their beneficiaries.
11:30 a.m. - 12:30 p.m.	**Lunch**
12:30 p.m. - 2:20 p.m. **GROUP SESSION** *10 min break included*	**Uniform Trust Code,** *Connie Eyster* Overview of the Colorado UTC statute. Practical Tips for Trustees Using the CUTC & Ethical Considerations for Attorneys Serving as Trustee
2:20 p.m. - 2:35 p.m.	**Break**
2:35 p.m. - 3:25 p.m. **BREAKOUT SESSION A** *Participants choose to attend A1 OR A2*	**A1 – Comprehensive Business Succession & Exit Planning Using Life Insurance,** *Jordon Scott* Comprehensive vs Traditional Business Succession Planning; Overview of 4 Basic Types of Buy-Sell Arrangements; Advanced Succession & Exit Strategies; Funding Sources **A2 – Introduction to Blockchain & Cryptocurrency,** *Crystal McDonough* What is Blockchain & How Does It Work? Application in Industry; Policy & Legal Considerations
3:25 p.m. - 3:35 p.m.	**Break**
3:35 p.m. - 4:25 p.m. **BREAKOUT SESSION B** *Participants choose to attend B1 OR B2*	**B1 – Auditors at the Gate,** *Lindsay Cigler* 9 Potential Tax Traps to Discuss with Business Owners **B2 – Advance Care Planning 101,** *Carol Fowler, MD & Susan Barton, Chaplain* Advance Directives: Useful documents and how they are archived. Ethical Dilemmas & Pitfalls: What arises in the hospital when advance directives are not present.
4:25 p.m. - 4:40 p.m.	**Group Wrap Up & Door Prize** *Debbie Vavak, Chair, Grand Junction Planned Giving Council*