



# ATG LEGAL EDUCATION

# ASSET PROTECTION PLANNING

Presented by ATG Trust Company

THURSDAY, SEPTEMBER 13, 2007 | LISLE, ILLINOIS

## DATES/LOCATIONS:

**Thursday, September 13, 2007**

Hilton Lisle/Naperville  
3003 Corporate West Drive  
Lisle, IL 60532-3603  
630.505.0900

**CHECK-IN: 8:00 A.M.**

**PROGRAM: 8:30 A.M. – 12:00 NOON**  
(INCLUDES CONTINENTAL BREAKFAST)

## ATTENDEE RATES:

**ATG Trust Member Attorneys: NO CHARGE**  
**All Others: \$65**

Register online in the member section of our website, [www.atgf.com](http://www.atgf.com), or register by fax, mail, or e-mail:

Suzy Auteberry, Registrar  
P.O. Box 9136  
Champaign, IL 61826-9136  
Fax: 217.403.7430  
E-mail: [sauteber@atgf.com](mailto:sauteber@atgf.com)

(Registration fee must be paid by cash or check. Sorry, no credit cards.)

## PROGRAM SUMMARY:

In today's financial climate, it is especially important to mitigate threats to the personal wealth and assets of your clients. This program is an introductory exploration of contemporary wealth protection planning methods, including domestic (U.S.) entities in conjunction with foreign *situs* asset protection trusts.

The speaker briefly discusses the source of client concerns regarding the need for wealth and asset protection planning. The program continues with an exploration of alternative methods of planning and an in-depth discussion of the concepts, theories, and principles of wealth protection planning and effective creditor protection using specific forms of entities, agreements and favorable jurisdictions to achieve the greatest wealth and asset protection available. Strategies covered include the following:

- Asset title and ownership shifting;
- Limited partnerships (LPs) and limited liability companies (LLCs);
- Asset protection trusts (domestic and offshore); and
- Choice of jurisdictions.

## WHO SHOULD ATTEND:

Estate planning attorneys.

## CONTINUING LEGAL EDUCATION INFORMATION:

ATG is an Illinois Accredited Continuing Legal Education Provider and also submits its programs for credit hours in Indiana and Wisconsin. This program qualifies for 3.5 hours of CLE credit in Illinois, Wisconsin, and Indiana.

### REGISTRATION FORM ASSET PROTECTION PLANNING THURSDAY, SEPTEMBER 13, 2007 | LISLE, ILLINOIS

Name: \_\_\_\_\_ Firm: \_\_\_\_\_ Member No.: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Phone: (\_\_\_\_) \_\_\_\_\_ Fax: (\_\_\_\_) \_\_\_\_\_ E-mail: \_\_\_\_\_

Attendee Name(s):	Attendee Type:						Amount Paid
	ATG Member/ Agent	New Attorney*	Paralegal	Attorney	Law Student	Support Staff	
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\*practicing three (3) years or less



ATG LEGAL  
EDUCATION

# BASIC SECTION 1031 "STARKER" TAX-DEFERRED EXCHANGES

Presented by ATG Trust Company

THURSDAY, SEPTEMBER 13, 2007 | LISLE, ILLINOIS

## DATES/LOCATIONS:

**Thursday, September 13, 2007**

Hilton Lisle/Naperville  
3003 Corporate West Drive  
Lisle, IL 60532-3603  
630.505.0900

**CHECK-IN: 12:30 P.M.**

**PROGRAM: 1:00 – 4:30 P.M.**

(INCLUDES REFRESHMENTS)

## ATTENDEE RATES:

**ATG Trust Member Attorneys: NO CHARGE**

**All Others: \$65**

Register online in the member section of our website, [www.atgf.com](http://www.atgf.com), or register by fax, mail, or e-mail:

Suzy Auteberry, Registrar  
P.O. Box 9136  
Champaign, IL 61826-9136  
Fax: 217.403.7430  
E-mail: [sauteber@atgf.com](mailto:sauteber@atgf.com)

(Registration fee must be paid by cash or check. Sorry, no credit cards.)

## PROGRAM SUMMARY:

Learn how to help your clients increase their wealth using tax-deferred dollars. Under § 1031 of the Internal Revenue Code, your clients can defer paying taxes on gains earned from investment property. Instead of seeing appreciation eaten away by taxes, clients can reinvest that money to build their real estate portfolios. These exchanges are one of the few remaining tax incentives available to people of virtually any income level. This program will introduce the basic elements of a tax-deferred exchange and provide a step-by-step guide through the process:

- Document and close the transaction;
- Comply with strict time limits;
- Properly identify the replacement property; and
- Take advantage of the Qualified Intermediary Safe Harbor.

This program features advanced topics such as reverse exchanges and the effects of IRS approval of them, reporting requirements, treatment of expenses and transaction costs, depreciation issues, effect of mortgages, exchanges between related persons, and exchanges of personal property.

**NOTE:** ATG Trust Company acts as a Qualified Intermediary to facilitate the exchange transaction. The use of a Qualified Intermediary is a safe harbor identified by the IRS in the regulations promulgated under § 1031. This safe harbor is especially important to you, since most attorneys will be considered disqualified persons under the IRS regulations. As a qualified intermediary, ATG Trust Company will provide you with the necessary documentation and guidance to make your transactions as smooth as possible.

## WHO SHOULD ATTEND:

All real estate or estate planning lawyers, paralegals, or legal assistants, plus real estate agents whose customers need assistance identifying Replacement Property.

## CONTINUING LEGAL EDUCATION INFORMATION:

ATG is an Illinois Accredited Continuing Legal Education Provider and also submits its programs for credit hours in Indiana and Wisconsin. This program qualifies for 3.5 hours of CLE credit in Illinois Wisconsin and Indiana

### REGISTRATION FORM

#### BASIC SECTION 1031 "STARKER" TAX-DEFERRED EXCHANGES

THURSDAY, SEPTEMBER 13, 2007 | LISLE, ILLINOIS

Name: \_\_\_\_\_ Firm: \_\_\_\_\_ Member No.: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Phone: ( ) \_\_\_\_\_ Fax: ( ) \_\_\_\_\_ E-mail: \_\_\_\_\_

Attendee Name(s):	Attendee Type:						Amount Paid
	ATG Member/ Agent	New Attorney*	Paralegal	Attorney	Law Student	Support Staff	
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\*practicing three (3) years or less