

FREE  
SEMINAR!



GUARANTY TRUST  
C O M P A N Y

**TIMES:**

**Registration/Breakfast:** 8:30 - 9:00 a.m.

**Program:** 9:00 a.m. - 4:00 p.m.  
(lunch included)

**DATES/LOCATIONS:**

**March 6, 2002**

Holiday Inn City Centre  
500 Hamilton Boulevard  
Peoria, IL 61602  
309.674.2500

**March 26, 2002**

Oak Brook Hills Hotel and Resort  
3500 Midwest Road  
Oak Brook, IL 60523-7010  
630.850.5555

**REGISTRATION:**

Suzy Auteberry, Registrar  
800.252.5206, ext. 130  
Fax: 217.359.2014  
sauteber@atgf.com

in conjunction with the

ATTORNEYS'  
TITLE  
GUARANTY  
FUND,  
INC.

2002 EDUCATIONAL PROGRAMS

## FUNDAMENTALS OF ESTATE PLANNING

### PROGRAM DESCRIPTION

This program will discuss federal estate taxation, the credit shelter trust, revocable living trusts, life insurance trusts, charitable giving, and other basic techniques to minimize estate tax exposure. Practical issues will be stressed, such as how to effectively relate to clients and the use of forms and checklists. The program topics include the following:

- Preliminary matters;
- Gift and estate tax rules;
- Effective use of a living trust;
- Non-tax issues to consider;
- Generation-skipping transfer tax for beginners;
- Life insurance and retirement benefits;
- "Form" documents; and
- Common estate planning scenarios.

### WHO SHOULD ATTEND

This program is designed for those lawyers who desire either to obtain a basic knowledge of the fundamentals of estate planning or who wish to refresh their expertise in certain areas.

### ABOUT THE SPEAKERS

**Jay P. Tarshis, Partner, Michael, Best & Friedrich, LLC, Chicago, Illinois** | Mr. Tarshis has conducted seminars in succession planning and in employee benefits in conjunction with estate planning. He is a member of the Chicago, Illinois State, and American Bar Associations. *Northwestern University, Evanston, Illinois, B.A., 1976; University of Illinois, Urbana-Champaign, J.D., 1980 (cum laude).*

**Mary-Ann Wilson, Partner, Michael, Best & Friedrich, LLC, Chicago, Illinois** | Ms. Wilson concentrates in tax, estate planning, and employee benefits issues. She has written about and conducted numerous seminars and courses for professionals. Topics included IRAs in estate planning, developments in estate planning, tax aspects of shareholder agreements, and employee stock ownership plans. She is a member of the Chicago Bar Association Trust Law Committee and actively involved in the Chicago Estate Planning Council. *Brown University, Providence, Rhode Island, B.A., Political Sciences, 1972; University of Denver, Colorado, J.D., 1975.*

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### 2002 FUNDAMENTALS OF ESTATE PLANNING REGISTRATION FORM

Please complete this form and mail/fax it to Suzy Auteberry, Illinois/Indiana Registrar, ATG, P.O. Box 9136, Champaign, IL 61826-9136, Fax: 217.359.2014. You can also register on line at [www.atgf.com](http://www.atgf.com). Questions? Call Suzy at 800.252.5206, ext. 130.

Name: \_\_\_\_\_ Firm: \_\_\_\_\_ Mbr No.: \_\_\_\_\_

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ Phone: ( \_\_\_\_\_ ) \_\_\_\_\_ E-mail: \_\_\_\_\_

Attendees: \_\_\_\_\_

Please register me/us for the following program:

☐ March 6/Peoria

☐ March 26/Oak Brook

☐ Send me information about Guaranty Trust Company membership. Visit our website: [www.guarantytrustcompany.com](http://www.guarantytrustcompany.com)