



GUARANTY TRUST  
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SEMINAR!**



GUARANTY TRUST  
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**CUTTING EDGE  
ESTATE PLANNING  
UNDER THE NEW TAX LAW**

SEPTEMBER 11, 2001  
HAWTHORN SUITES, LTD.  
CHAMPAIGN, ILLINOIS

SEPTEMBER 19, 2001  
BUTTERFIELD COUNTRY CLUB  
OAK BROOK, ILLINOIS

SEPTEMBER 26, 2001  
HOLIDAY INN  
MT. VERNON, ILLINOIS

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WITH THE

ATTORNEYS'  
TITLE  
GUARANTY  
FUND,  
INC.

**2001**  
EDUCATIONAL  
PROGRAMS

## PROGRAM DESCRIPTION

This program focuses on the changes in the tax law that affect estate planning. The speakers will discuss how the changes impact on the standard estate plan, how to stay flexible in response to the changes in the law, and how to plan for succession in the family business. The program will cover the following areas:

### The Changes to the Tax Law that Affect You

- ♦ Gift, estate, and generation-skipping taxes
- ♦ Income taxes
- ♦ Tax clauses

### The Effects on the Standard Estate Plan

- ♦ Planning for the credit shelter amount
- ♦ Generation skipping tax exemptions

### What Will and Won't Work in the Future

- ♦ Irrevocable life insurance trusts
- ♦ Qualified personal residence trusts
- ♦ Grantor-retained annuity trusts and grantor-retained unitrusts
- ♦ Charitable trusts
- ♦ Self-cancelling installment notes
- ♦ Private annuities

### Business Succession Planning for the Family Business

- ♦ Planning and income tax issues involved in preparing buy-sell agreements
- ♦ Issues in passing a business to family members
- ♦ Gift strategies (recapitalization, family limited partnerships, discount planning)
- ♦ Techniques for equalizing among family members and determining if this is the right move for your client
- ♦ Estate and gift tax planning
- ♦ The sale of a business
- ♦ Employee stock ownership plans

Come prepared to ask questions.

## WHO SHOULD ATTEND

This program is designed for estate planning and asset protection practitioners who wish to learn more "cutting edge" techniques and practices.

**Program Questions? Call 800.252.5206, ext. 130**

## LOCATIONS

**Tue, September 11, 2001**  
**Hawthorn Suites, Ltd.**  
101 Trade Centre Drive  
Champaign, IL 61820  
217.398.3400

**Wed, September 26, 2001**  
**Holiday Inn**  
222 Potomac Boulevard  
Mt. Vernon, IL 62864  
618.244.7100

**Wed, September 19, 2001**  
**Butterfield Country Club**  
2800 Midwest Road  
Oak Brook, IL 60523  
630.323.1000

## TIME

**Check-In: 8:30 - 9:00 a.m. (includes continental breakfast)**  
**Program: 9:00 a.m. - 4:00 p.m. (includes lunch)**

## 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.*

**GUARANTY TRUST COMPANY** is a full service, independent trust company that can serve all your clients' trust needs.

Over the past several years, trust officers and even whole trust departments have merged, moved, or otherwise been eliminated from the local scene, leaving many consumers without options for sound financial guidance from a local professional. Attorneys' Title Guaranty Fund, Inc. (ATG®), a lawyer-service organization, formed Guaranty Trust to fill a very special need. Lawyers who have long served as trusted advisers to their clients can now serve those clients in a whole new way: Investment planning through Guaranty Trust.

Guaranty Trust Company is fully authorized to do business in the state of Wisconsin. If you are interested in learning how Guaranty Trust Company can help you expand your estate planning practice and better serve your clients, call us at 312.33TRUST.

## CUTTING EDGE ESTATE PLANNING UNDER THE NEW TAX LAW

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

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

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

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

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

☐ 9/11/01: CHAMPAIGN, IL ☐ 9/19/01: OAK BROOK, IL ☐ 9/26/01: MT. VERNON