

FREE  
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GUARANTY TRUST  
C O M P A N Y

ESTATE AND TAX  
PLANNING AFTER THE  
2001 TAX REFORM ACT

OCTOBER 25, 2001  
COUNTRY INN AND SUITES  
PEWAUKEE, WISCONSIN

OCTOBER 26, 2001  
HOLIDAY INN EAST  
MADISON, WISCONSIN

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FUND,  
INC.

2001 EDUCATIONAL  
PROGRAMS

## PROGRAM DESCRIPTION

If you think your estate and tax planning practice has become simpler under the 2001 Tax Reform Act, you are in for a big surprise. Many of your clients will benefit directly from the recent tax law changes, but your role as their adviser has become much more complicated.

This program covers significant changes brought about by the passage of the Act. The speaker will demonstrate how estate and tax planning practitioners can deal with the changes in all areas of their practices, including document drafting, income tax planning, and retirement planning.

### Estate Tax Planning

- ♦ Overview of the New Estate Tax Provisions
- ♦ Reduction of Transfer Taxes
- ♦ Carry-Over Basis
- ♦ Generation Skipping Tax
- ♦ Impact for Estate Planning Professionals
- ♦ Drafting Techniques under the New Estate Tax Law

### Individual Income Tax Planning

### Tax Benefits for Children

### Marriage Penalty Relief

### Education Incentives

### Retirement Planning Provisions (including contribution and deduction limits)

- ♦ IRA Provisions
- ♦ Employer Qualified Plan Benefits
- ♦ Contribution Limits
- ♦ Election/Deferrals
- ♦ Rollovers and Miscellaneous Provisions

### Alternative Minimum Tax Provisions

### Practical Considerations

Come prepared to ask questions.

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

## WHO SHOULD ATTEND

This program is designed for estate and tax planning practitioners who wish to learn about the ramifications of the new tax laws to them and their clients.

## LOCATIONS

**Thu, October 25, 2001**  
**Country Inn and Suites**  
2810 Golf Road  
Pewaukee, WI 53072  
262.547.0201

**Fri, October 26, 2001**  
**Holiday Inn East**  
3841 E. Washington Ave.  
Madison, WI 53704  
608.244.2481

## TIME

**Check-In: 8:00 - 8:30 a.m. (includes continental breakfast)**

**Program: 8:30 a.m. - noon**

## ABOUT THE SPEAKER

ROBERT G. ALEXANDER, President, Alexander and Klemmer, S.C., *Wauwatosa, Wisconsin* | Mr. Alexander has practiced law for over 20 years, concentrating in federal, estate, and gift taxation, trust and estate administration, fiduciary income taxation, estate planning, life insurance planning, charitable planning, and business planning. An experienced lecturer, he holds accreditation as an Estate Planner from the National Association of Estate Planners and Councils. *DePaul University, Chicago, Illinois, LL.M. 1984; University of Wisconsin, Milwaukee, J.D. 1976; B.S. 1977.*

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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.

## ESTATE AND TAX PLANNING AFTER THE 2001 TAX REFORM ACT

Please complete this form and mail/fax it to Ginny Herale, Wisconsin Registrar, ATG, 559 D'Onofrio Drive, Suite 100, Madison, WI 53719-2843, Fax: 608.827.5688. You can also register on line at [www.atgf.com](http://www.atgf.com). Questions? Call Ginny at 800.788.8989.

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

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

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

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

☐ 10/25/01: PEWAUKEE, WI

☐ 10/26/01: MADISON, WI