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GUARANTY TRUST
C O M P A N Y

FUNDAMENTALS OF ESTATE PLANNING

MAY 16, 2001

HOTEL PERE MARQUETTE
PEORIA, ILLINOIS

MAY 23, 2001

THE MID-AMERICA CLUB
CHICAGO, ILLINOIS

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2001
EDUCATIONAL
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c/o Attorneys' Title Guaranty Fund, Inc.
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C O M P A N Y



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FUNDAMENTALS OF ESTATE PLANNING

Please complete this form and mail/fax it to Suzy Auteberry, GTC Registrar, ATG, P.O. Box 9136, Champaign, IL 61826-9136, Fax: 217.359.2014. You can also register on-line at www.atgf.com.

Name: _____ Firm: _____ Mbr No.: _____

Address: _____

City: _____ State: _____ Zip: _____ Phone: _____ E-mail: _____

Attendees: _____

☐ 5/16/01: Peoria, IL ☐ 5/23/01: Chicago, IL

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.

DATES/LOCATIONS

Wed, May 16, 2001

**LUNCH HOSTED BY
CAPITAL FUNDING**

Hotel Pere Marquette
501 Main Street
Peoria, IL 61602-1092
309.637.6500

Wed, May 23, 2001

The Mid-America Club
Aon Center, 80th Floor
200 East Randolph Drive
Chicago, IL 60601
312.861.1100

TIME

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

NOTE: During lunch at the Peoria seminar, Capital Funding representatives will demonstrate an innovative mortgage origination program for attorneys. Learn how you can expand your practice and offer more to your clients through Capital Funding.

ABOUT THE SPEAKERS

JAY P. TARSHIS, Partner, Schwartz & Freeman, 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, Schwartz & Freeman, 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.

Program Questions? Call 800.252.5206, ext. 130.

Visit the ATG website, www.atgf.com, to register on-line, generate a map/directions to a program, or to learn more about GTC/ATG educational programs.

DIRECTIONS TO THE MID-AMERICA CLUB:

From the North: Lake Shore Dr. south to Randolph Dr. exit (turn right). Drive 2 blocks to Columbus Dr. (turn right at stop light into the left lane). Drive one block to Lake St. (turn left at stop light). Drive 1/2 block. Entrance to Aon parking garage on left side of Lake St.

From the South: Lake Shore Dr. north to Randolph Dr. exit (turn left). Drive 2 blocks to Columbus Dr. (turn right at stop light into the left lane). Drive one block to Lake St. (turn left at stop light). Drive 1/2 block. Entrance to Aon parking garage on left side of Lake St.

From the West (I-90/I-94 – Dan Ryan/O'Hare Airport): Ohio St. exit east to Michigan Ave. (turn right). Drive 2 blocks past the river to Inter. S. Water St. (turn right at stop light). Drive 1/2 block to Inter. Stetson St. (turn right at stop light). The road curves east, entrance to Aon parking garage on the right.

From the West (I-290 – Eisenhower): Congress east to Michigan Ave. (turn left). Drive 1 1/2 miles (2 blocks passed Randolph Dr.) to Inter. S. Water St. (turn right at stop light). Drive 1/2 block to Inter. Stetson St. (turn right at stop light). The road curves east, entrance to Aon parking garage on the right.

