

# 2001 HELP CLIENTS BUILD WEALTH: §1031 TAX-DEFERRED (STARKER) EXCHANGES

ATTORNEYS'  
TITLE  
GUARANTY  
FUND,  
INC.

## Thursday, March 15, 2001

Jumer's Chateau  
1601 Jumer Drive  
Bloomington, IL 61704  
309.662.2020

## Tuesday, April 17, 2001

Hotel Pere Marquette  
501 Main Street  
Peoria, IL 61602  
309.637.6500

## Thursday, June 7, 2001

Park Inn  
2101 North Mountain Road  
Wausau, WI 54401  
715.842.0711

## Tuesday, September 11, 2001

Hamburger University at  
McDonald's  
Office Campus  
2815 Jorie Boulevard  
Oak Brook, IL 60523  
630.990.5800

## Thursday, March 22, 2001

(co-sponsored by Guaranty Trust  
Company and Northland Title,  
LLC)  
Del Webb's Sun City - Prairie  
Lodge  
12860 Del Webb Boulevard  
Huntley, IL 60142  
847.515.7344

## Friday, April 20, 2001

Wyndham Hotel  
139 East Kilbourn Avenue  
Milwaukee, WI 53202  
414.276.8686

## Friday, June 8, 2001

Holiday Inn  
205 South Barstow Street  
Eau Claire, WI 54701  
715.835.6121

## Thursday, September 13, 2001

Evansville Airport Marriott  
7101 Highway 41 North  
Evansville, IN 47725  
812.867.7999

### Wisconsin Programs:

Registration/Continental Breakfast: 8:00 - 8:30 a.m.  
Program: 8:30 - noon

### Illinois Programs:

Registration/Continental Breakfast: 8:30 - 9:00 a.m.  
Program: 9:00 - noon

### Indiana Program:

Registration: 12:30 - 1:00 p.m.  
Program: 1:00 - 4:00 p.m.

### WHAT YOU WILL LEARN:

ATG's popular half-day program will show you 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.

ATG 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 will provide you with the necessary documentation and guidance to make your transactions as smooth as possible. **New: The IRS has approved reverse exchanges – learn how this affects you**

**and your clients.** This program will also feature advanced topics such as reporting requirements, treatment of expenses and transaction costs, depreciation issues, effect of mortgages, exchanges between related persons, and exchanges of personal property.

### WHO SHOULD ATTEND:

All real estate or estate planning lawyers, legal secretaries, paralegals, or legal assistants, plus real estate salespeople whose customers need assistance identifying Replacement Property. This program approved for 3.0 CLE and 3.0 CIE credit hours in Indiana and 3.5 CLE credit hours in Wisconsin. **There is NO CHARGE for ATG members and their employees; \$25 per person for all others.**

### ABOUT THE SPEAKER:

**HUGH E. POLLARD, Senior Manager, Escrow and Staff Attorney Chicago, Illinois** | Mr. Pollard manages ATG's Escrow Department, including §1031 (Starker) exchanges, deed and money escrows, title indemnities, and construction escrows. He also handles underwriting questions and closing problems. He is a frequent lecturer on §1031 (Starker) tax-deferred exchanges and title insurance matters and is a contributing author to *Law at a Glance: The Legal Assistant's Guide to the Law* (1993) and *Professional Liability* (1996), publications of the Illinois Institute for CLE. *Chicago-Kent College of Law, J.D. 1983; DePaul University, Chicago, M.B.A. 1980; Loyola University of Chicago, B.A. 1975.*

**EARN CLE CREDITS  
IN WISCONSIN; CIE/CLE  
CREDITS IN INDIANA!**

# 2001 PROGRAM DESCRIPTIONS

ATTORNEYS'  
TITLE  
GUARANTY  
FUND,  
INC.

## FUNDAMENTALS OF ESTATE PLANNING<sup>†</sup>

(a Guaranty Trust Company program)

To Be Held In: ☒ Illinois ☐ Indiana ☐ Wisconsin

3/7: Oak Brook | 3/13: Peoria | 3/21: Collinsville

**WHAT YOU WILL LEARN:** This program covers federal estate taxation, the credit shelter trust, generation skipping tax, 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.

**WHO SHOULD ATTEND:** 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. There is **no charge** for this program.

## THE REAL ESTATE CLOSING: DOCUMENT PREPARATION AND IMPORTANT CLOSING ISSUES

To Be Held In: ☐ Illinois ☐ Indiana ☒ Wisconsin

4/5: Pewaukee | 4/26: Madison

**WHAT YOU WILL LEARN:** This program teaches attendees the myriad steps involved in preparing and conducting a real estate closing. It includes a discussion of closing problems, their solutions, and tips to ease closing hassles, lender documents, mortgage payoffs, insured closing letters, §1099 reporting, and more.

**WHO SHOULD ATTEND:** Lawyers, paralegals, legal assistants, secretaries, and any other employees who deal with or prepare forms and other documents for closings. There is **no charge** for ATG members and their employees; \$25 per person for all others.

**EDUCATION CREDITS:** This program qualifies for 3.5 CLE credit hours.

## TITLE INSURANCE FUNDAMENTALS

To Be Held In: ☒ Illinois ☒ Indiana ☒ Wisconsin

WI 3/8: Milwaukee | 3/13: Madison | 5/10: Green Bay

IL 4/12: Oak Lawn | 5/9: Peoria | 10/2: Oak Brook | 10/11: Collinsville  
IN 4/18: Merrillville | 9/13: Evansville

**WHAT YOU WILL LEARN:** This program focuses on title insurance policy coverage and closing documents. Topics include the significance of the commitment, Owner policy, and Mortgagee (Lender) policy; basic closing documents (checklists, deeds, loan documents, and more), and commonly used affidavits and endorsements.

**WHO SHOULD ATTEND:** We urge all ATG member attorneys, non-member attorneys, and their paralegals, legal assistants, secretaries, and closers to attend. There is **no charge** for ATG members and their employees; \$25 per person for all others.

**EDUCATION CREDITS:** This program qualifies for 2.0 CIE and 3.0 CLE credit hours in Indiana and 3.5 CLE credit hours and toward the attorney title insurance license requirement in Wisconsin.

## TITLE UNDERWRITING 1

To Be Held In: ☐ Illinois ☐ Indiana ☒ Wisconsin

3/14: Madison | 3/22: Pewaukee | 5/11: Green Bay | 9/12: Eau Claire

**WHAT YOU WILL LEARN:** This program will cover some of the basic issues confronting title examiners and underwriters. We will examine how the nature of the person or entity in title affects underwriting requirements, how to "cure" particular title defects arising from lack of authority to convey, foreclosure, unprobated estates, and more.

**WHO SHOULD ATTEND:** Anyone involved in real estate transaction: attorneys, legal assistants, title examiners, and closing personnel. There is **no charge** for ATG members and their employees; \$25 per person for all others.

**EDUCATION CREDITS:** This program qualifies for 3.5 CLE credit hours and toward the attorney title insurance license requirement.

<sup>†</sup>Full-day program, includes lunch

# 2001 SPRING EDUCATIONAL PROGRAM CALENDAR

ATTORNEYS'  
TITLE  
GUARANTY  
FUND,  
INC.

This calendar is based on the information available at press time. Dates, speakers, and locations are subject to change as additional information is confirmed. Please watch future mailings or visit our website, [www.atgf.com](http://www.atgf.com), for updated information and on-line registration.

MONTH	STATE	DAY/DATE	PROGRAM TITLE	TIME	FACILITY/CITY
March	IL	Thu, 3/15	Help Clients Build Wealth: §1031 Tax-Deferred (Starker) Exchanges	8:30 a.m. - noon	Jumer's Chateau 1601 Jumer Drive Bloomington, IL 61704 309.662.2020
	IL	Wed, 3/21	Fundamentals of Estate Planning (a Guaranty Trust Company program)	8:30 a.m. - 4:00 p.m.	Holiday Inn 1000 Eastport Plaza Drive Collinsville, IL 62234-6103 618.345.2800

WI	Thu, 3/22	Title Underwriting 1	8:00 a.m. - noon	<b>Country Inn &amp; Suites</b> 2810 Golf Road Pewaukee, WI 53072 262.547.0201
IL	Thu, 3/22	<b>Help Clients Build Wealth: §1031 Tax-Deferred (Starker) Exchanges</b> <i>(co-sponsored by Guaranty Trust Company and Northland Title LLC)</i>	8:30 a.m. - noon	<b>Del Webb's Sun City - Prairie Lodge</b> 12860 Del Webb Boulevard Huntley, IL 60142 847.515.7344

<b>April</b>	WI	Thu, 4/5	The Real Estate Closing	8:00 a.m. - noon	<b>Country Inn &amp; Suites</b> 2810 Golf Road Pewaukee, WI 53072 262.547.0201
	IL	Thu, 4/12	Title Insurance Fundamentals - Illinois	8:30 a.m. - noon	<b>Oak Lawn Hilton</b> Cicero Avenue at 94th Street Oak Lawn, IL 60453 708.425.7800
	IL	Tue, 4/17	<b>Help Clients Build Wealth: §1031 Tax-Deferred (Starker) Exchanges</b>	8:30 a.m. - noon	<b>Hotel Pere Marquette</b> 501 Main Street Peoria, IL 61602 309.637.6500
	IN	Wed, 4/18	Title Insurance Fundamentals - Indiana	8:30 a.m. - noon	<b>Radisson Hotel at Star Plaza</b> 800 East 81st Street Merrillville, IN 46410 219.769.6311
	WI	Fri, 4/20	<b>Help Clients Build Wealth: §1031 Tax-Deferred (Starker) Exchanges</b>	8:00 a.m. - noon	<b>Wyndham Hotel</b> 139 East Kilbourn Avenue Milwaukee, WI 53202 414.276.8686
	WI	Thu, 4/26	The Real Estate Closing	8:00 a.m. - noon	<b>Radisson Hotel</b> 517 Grand Canyon Drive Madison, WI 53719 608.833.9501

<b>May</b>	IL	Wed, 5/9	Title Insurance Fundamentals - Illinois	8:30 a.m. - noon	<b>Hotel Pere Marquette</b> 501 Main Street Peoria, IL 61602 309.637.6500
	WI	Thu, 5/10	Title Insurance Fundamentals - Wisconsin	8:00 a.m. - noon	<b>Radisson Hotel</b> 2040 Airport Drive Green Bay, WI 54313 920.494.7300
	WI	Fri, 5/11	Title Underwriting 1	8:00 a.m. - noon	<b>Radisson Hotel</b> 2040 Airport Drive Green Bay, WI 54313 920.494.7300

<b>June</b>	WI	Thu, 6/7	<b>Help Clients Build Wealth: §1031 Tax-Deferred (Starker) Exchanges</b>	8:00 a.m. - noon	<b>Park Inn</b> 2101 North Mountain Road Wausau, WI 54401 715.842.0711
	WI	Fri, 6/8	<b>Help Clients Build Wealth: §1031 Tax-Deferred (Starker) Exchanges</b>	8:00 a.m. - noon	<b>Holiday Inn</b> 205 South Barstow Street Eau Claire, WI 54701 715.835.6121

# HELP CLIENTS BUILD WEALTH: §1031 TAX-DEFERRED (STARKER) EXCHANGES

EDUCATIONAL  
PROGRAMS  
2001  
ATTORNEYS'  
TITLE  
GUARANTY  
FUND,  
INC.

EARN CLE CREDITS  
IN WISCONSIN; CLE/CLE  
IN CREDITS IN INDIANA!



2408 Windsor Place  
P.O. Box 9136  
Champaign, IL 61826-9136

PRESORTED  
STANDARD  
U.S. POSTAGE PAID  
CHAMPAIGN, IL  
PERMIT NO. 384

## HELP CLIENTS BUILD WEALTH: §1031 TAX-DEFERRED (STARKER) EXCHANGES

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; or to Ginny Herale, Wisconsin Registrar, ATG, 559 D'Onofrio Drive, Madison, WI 53719-2808, Fax: 608.827.5688. You can also register on line at [www.atgf.com](http://www.atgf.com). Questions? Call Suzy at 800.252.5206, ext. 130 or Ginny at 800.788.8989.

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

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

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

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

☐ 3/15: Bloomington, IL   ☐ 3/22: Huntley, IL   ☐ 4/17: Peoria, IL   ☐ 4/20: Milwaukee, WI  
☐ 6/7: Wausau, WI   ☐ 6/8: Eau Claire, WI   ☐ 9/11: Oak Brook, IL   ☐ 9/13: Evansville, IN

Enclosed is my non-member fee (if applicable): Total Attendees \_\_\_\_\_ @ \$25 per person per program = \$ \_\_\_\_\_ ☐ Send me information about ATG membership

Please send registration information on the following program(s): \_\_\_\_\_ Date/Location: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_