

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-sponsors: Guaranty Trust
Company, 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.

NOTE:

– LEARN HOW IRS APPROVAL OF REVERSE EXCHANGES AFFECTS YOU AND YOUR CLIENTS.

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

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 qualifies for 3.5 CLE credit hours in Wisconsin. We have applied for CLE and CIE credits in Indiana. **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; CLE/CLE
CREDITS IN INDIANA!

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EDUCATIONAL
PROGRAMS
2001
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Champaign, IL 61826-9136

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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. 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: _____

