


GUARANTY TRUST
C O M P A N Y

c/o Attorneys' Title Guaranty Fund, Inc.
559 D'Onofrio Drive, Suite 100
Madison, WI 53719-2843

FREE!
3.5 CLE
CREDIT HOURS
APPLIED FOR
SEE



GUARANTY TRUST
C O M P A N Y

TRUST
MANAGEMENT:
THE FINAL CHAPTER

JUNE 5, 2001
HOLIDAY INN EAST
MADISON, WISCONSIN

JUNE 6, 2001
WYNDHAM HOTEL
MILWAUKEE, WISCONSIN

JUNE 7, 2001
STONE HARBOR RESORT
STURGEON BAY, WISCONSIN

GUARANTY TRUST COMPANY IS A SUBSIDIARY OF
ATTORNEYS' TITLE GUARANTY FUND, INC.

IN CONJUNCTION WITH THE

ATTORNEYS'
TITLE
GUARANTY
FUND,
INC.

2001 EDUCATIONAL
PROGRAMS

PROGRAM DESCRIPTION

Trust Management: The Final Chapter will provide an overview of the issues the lawyer and client need to consider in settling a revocable trust after the death of the settlor. The speakers will discuss family needs, trust administration principles, and related tax matters. The program will emphasize the technical and practical elements necessary to meet the client's goals and objectives in an efficient manner. Topics include the following:

- ♦ An overview of the trust administrative process;
- ♦ Trust creation, formation, funding;
- ♦ Coordinating the trust administration process;
- ♦ Calendaring important dates;
- ♦ Estate, gift, and generation skipping transfer tax issues;
- ♦ Disclaimers, elections, distributions and sub-trust funding;
- ♦ Special issues in administering the trust;
- ♦ Creditor and marital property rights;
- ♦ Marital deduction issues;
- ♦ Identifying tax and accounting issues; and
- ♦ The lawyer and accountant team.

WHO SHOULD ATTEND

Attorneys, their staff, paralegals, and professionals who interact with attorneys in areas of estate planning and financial planning.

LOCATIONS

Tue, June 5, 2001
Holiday Inn East
3841 E. Washington Ave.
Madison, WI 53704
608.244.2481

Wed, June 6, 2001
Wyndham Hotel
139 E. Kilbourn Ave.
Milwaukee, WI 53202
414.276.8686

Thu, June 7, 2001
Stone Harbor Resort
107 N. First Ave.
Sturgeon Bay, WI 54235
877.746.0700

TIME

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

WE HAVE APPLIED FOR 3.5 CLE CREDIT HOURS. THERE IS NO CHARGE FOR THIS PROGRAM!

ABOUT THE SPEAKERS

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.*

JOHN V. KITZKE, Kitzke & Associates, S.C., *Saukville, Wisconsin* | Mr. Kitzke has provided legal services to estate planning, real estate, and business clients for more than 28 years, preparing and helping to administer thousands of basic and advanced trusts. He has also written and spoken extensively on estate planning. He has served on the State Bar of Wisconsin Board of Governors, has sat on various State Bar committees, and is past president of the Saukville Chamber of Commerce. *University of Wisconsin, Milwaukee, B.S. 1970; Marquette Law School, Milwaukee, Wisconsin, J.D. 1972.*

TERRENCE J. SCHMIDT, M.S., CPA, President, Schmidt & Company CPAs, S.C., *Milwaukee, Wisconsin* | Mr. Schmidt has worked in accounting for more than 20 years. His experience includes handling estate planning, tax planning, accounting services, and financial planning for individual and corporate clients. A frequent lecturer for professional groups on the topics of tax and financial planning, Mr. Schmidt holds Series 7, 63, and 65 licenses and is also licensed in Health and Life Insurance. He founded his own CPA practice in 1994 where his focus is to provide the highest-quality personalized financial services to his clients. *University of Wisconsin, Fond du Lac, A.S. 1977; University of Wisconsin, Milwaukee B.B.A. 1980; M.S. 1987.*

Program Questions? Call 800.788.8989
Register on-line at www.atgf.com

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.

TRUST MANAGEMENT: THE FINAL CHAPTER

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. Questions? Call Ginny at 800.788.8989.

Name: _____ Firm: _____

Address: _____

City: _____ State: _____ Zip: _____ Phone: (____) _____ E-mail: _____

Attendees: _____

☐ 6/5: Madison ☐ 6/6: Milwaukee ☐ 6/7: Sturgeon Bay

☐ Send me information about GTC membership

☐ Send me information about ATG membership