Baltimore Estate Planning Council
and the *Chesapeake Planned Giving Council*
Annual Joint Meeting: Charitable Planning Potpourri
featuring: Lawrence P. Katzenstein, Thompson Coburn, LLP
Sponsored by: **PNC Bank**

Thursday May 6, 2010
Crowne Plaza Baltimore

(formerly the Holiday Inn Timonium)
2004 Greenspring Drive, Timonium, MD – 410/252-7373

About the program: This year's charitable planning update will include; why charities need to monitor bequests, creative uses of flip unitrusts, marital deduction issues in charitable planning and what's new in termination and division of charitable remainder trusts.

About the speaker: Mr. Katzenstein is a nationally known authority on estate planning and planned giving, and a frequent speaker around the country to professional groups. He has been retained by the Internal Revenue Service to provide continuing legal education programs to IRS estate and gift tax attorneys. He appears annually on several American Bar Association-American Law Institute estate planning programs, and has spoken at many other national tax institutes, including the Notre Dame Tax Institute, the University of Miami Heckerling Estate Planning Institute and the Southern Federal Tax Institute. Mr. Katzenstein is an adjunct professor at the Washington University School of Law where he has taught both estate and gift taxation and fiduciary income taxation. A former chair of the American Bar Association Tax Section Fiduciary Income Tax Committee, he is current chair of several Tax Section charitable planning subcommittees. He is a fellow of the American College of Trust and Estate Counsel and is listed in Best Lawyers in America in the trusts and estates category. Mr. Katzenstein is also the creator of Tiger Tables actuarial software, which is widely used around the country by tax lawyers and accountants as well as the Internal Revenue Service.

- **7:15 a.m. Coffee & Networking**
- **7:30 Breakfast**
- **8:00-9:00 - Mr Katzenstein's Presentation**

Two Meeting Requirement – This the final program of the BEPC 2009-2010 year. To maintain membership in the Baltimore Estate Planning Council, active members are required to attend at least two educational meetings annually. **Reservations must be pre-paid.**

Cancellation Policy – Reservations must be canceled in writing or by e-mail and received no later than Monday May 3, 2010

CPA, CFP and Insurance CE has been approved for one hour.

REGISTRATION FORM AND FEES ON THE OPPOSITE SIDE

Baltimore Estate Planning Council with the
Chesapeake Planned Giving Council Breakfast Meeting
Thursday May 6, 2010 – Crowne Plaza Baltimore
Charitable Planning Potpourri
featuring: **Lawrence Katzenstein,** Thomas Coburn, LLP

REGISTRATION INFORMATION

Cost to Attend:	Received before 4/30/2009	Received after 4/30/2009
BEPC & CGPC Members	**$50.00**	**$65.00**
Guests	**$70.00**	**$80.00**

Name ______________________________ Name for Badge ____________________

Company ________________________________ Day Phone ____________________

E-mail ________________________________

Member Type: ☐ ATTY ☐ CFP ☐ CPA ☐ QFA ☐ TO ☐ Non-Profit

☐ **BEPC PRE-PAID MEMBER** ☐ CPGC Member

BEPC Guest Registration:

Guest's Name ______________________________ Name for Badge ______________

Company: ______________________________ Guest's Day Phone ______________

Guest E-mail Address ______________________________________

☐ **BEPC MEMBERS ONLY** This is my complimentary guest – *each* ***BEPC member*** *receives* ***one complimentary guest pass*** *each BEPC year*.

Payment $ ________ By: ☐ Check ☐ MasterCard ☐ Visa ☐ American Express

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Printed Name **and** Signature:

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Return this form with your payment to:

The Baltimore Estate Planning Council
8480M Baltimore National Pike, #242
Ellicott City, MD 21043
(410) 465-7011; FAX (410) 465-7073
Email: **BEPC@rxassociationmgt.com**

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www.baltimoreepc.org