Baltimore Estate Planning Council
and the *Chesapeake Planned Giving Council*
Annual Joint Meeting: Retirement Plans, Charitable Giving and Changing Tax Rates
featuring: **Professor Christopher Hoyt**
Sponsored by: **Kennedy Krieger**

Tuesday May 17, 2011
Crowne Plaza Baltimore

2004 Greenspring Drive, Timonium, MD – 410/252-7373

About the program: The Bush Tax Cuts have been extended into 2011 and 2012, but taxpayers face a large tax increase in 2013 when the Bush Tax Cuts expire and the new health care taxes take effect. What does this mean for donors who are planning gifts for the next few years? Enjoy an overview of the big picture, with special emphasis on planning gifts of retirement assets, both in this year and in 2012 when Charitable IRA Rollover will need to be "re-extended" again. See how charitable planning can tie into 2011 Roth IRA Conversions and learn the best and simplest ways to structure charitable bequests of retirement assets.

About the speaker: Professor Christopher R. Hoyt teaches courses in the areas of federal taxation, business organizations, retirement plans, and tax-exempt organizations. Previously, he was with the law firm of Spencer, Fane, Britt & Browne in Kansas City, Missouri. He received an undergraduate degree in economics from Northwestern University and he received dual law and accounting degrees from the University of Wisconsin. He attained membership in the Order of the Coif and received three American Jurisprudence Awards for achievements in specific classes. He is currently the Chair of the American Bar Association's Committee on Lifetime and Testamentary Charitable Gift Planning (Section of Probate and Trust) and serves on the editorial board of Trusts and Estates magazine. He is a frequent speaker at legal and educational programs and has been quoted in numerous publications, including The Wall Street Journal, Forbes, MONEY Magazine and The Washington Post.

- **7:15 a.m. Coffee & Networking**
- **7:30 Breakfast**
- **8:00-9:00 – Professor Hoyt's Presentation**

Two Meeting Requirement – This the sixth of eight programs of the BEPC 2010-2011 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 Friday May 13, 2011.

CPA, CFP and Insurance accreditation is being applied for.
REGISTRATION FORM AND FEES ON THE OPPOSITE SIDE

Baltimore Estate Planning Council with the
Chesapeake Planned Giving Council Breakfast Meeting
Tuesday May 17, 2011 – Crowne Plaza Baltimore

"Retirement Plans, Charitable Giving and Changing Tax Rates"

featuring: **Professor Christopher Hoyt**

REGISTRATION INFORMATION

Cost to Attend:	Received before 5/13/2011	Received after 5/13/2011
BEPC & CGPC Members	**$50.00**	**$65.00**
Guests	**$75.00**	**$90.00**

Name ____ Name for Badge ___________________________

Company ____ Day Phone ___________________________

E-mail ____

Member Type: ☐ ATY ☐ CFP ☐ CPA ☐ QFA ☐ TO ☐ Non-Profit ☐ CPGC Member

☐ **BEPC PRE-PAID MEMBER**

BEPC Guest Registration:

Guest's Name ____ Name for Badge ____________________

Company: ____ Guest's Day Phone ___________________

Guest E-mail Address ____

☐ This is my complimentary guest – *each* ***BEPC member*** *receives* ***<u>one complimentary guest pass</u>*** *each BEPC year.*

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

Card # ____ Exp. Date _____________

Printed Name **<u>and</u>** Signature:

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Return this form with your payment to:

OR SIGN UP ON LINE AT OUR WEBSITE:
<u>www.baltimoreepc.org</u>

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