



**Baltimore Estate Planning Council**  
and the *Chesapeake Planned Giving Council*  
**Annual Joint Meeting**

**Charitable Gab Bag: Tricks, Traps & Tips**

featuring: **Lawrence P. Katzenstein**, Thompson Coburn, LLP

**Sponsored by: Mercantile-Safe Deposit & Trust**

**Wednesday April 26, 2006**

**Holiday Inn Timonium**

2004 Greenspring Drive, Timonium, MD 21093 – 410/252-7373

Mr. Katzenstein will discuss: Marital deduction traps in charitable planning; new spousal waiver requirements for charitable remainder trusts; income tax issues in administration of estates with charitable beneficiaries; sale of tangible personal property through charitable remainder trusts; a number of other issues.

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 Internal Revenue Service 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 am Coffee & Networking**

Cost to Attend:

BEPC Members

Guests

**7:30 Breakfast**

Received before 04/21/06

**\$35.00**

**\$55.00**

**8:00 am Mr. Katzenstein's Remarks**

Received after 4/21/06

**\$45.00**

**\$60.00**

**Two Meeting Requirement** – To maintain membership in the Baltimore Estate Planning Council, active members are required to attend at least two educational meetings annually. *This is the last educational meeting of the year.*

**All reservations must be pre-paid.**

**Cancellation Policy** – Reservations must be canceled in writing and received no later than Monday April 24, 2006

Name \_\_\_\_\_ Name for Badge \_\_\_\_\_

Company \_\_\_\_\_ E-mail \_\_\_\_\_

Member Type:  ATTY  CFP  CPA  QFA  TO  NonProfit  CPGC Member  **PRE-PAID**

BEPC Guest Registration:

Guest's Name \_\_\_\_\_ Company: \_\_\_\_\_

Payment \$ \_\_\_\_\_ By:  Check  MasterCard  Visa  American Express

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**The Baltimore Estate Planning Council**

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