11th Annual Estate Planning Seminar
Sponsored by Boy Scouts of America, Greater Cleveland Council
Program Moderator - P. Thomas Austin, BSA Executive Board Member

September 14 and 15, 2016 • 1:00 p.m. to 5:30 p.m. • 2241 Woodland Avenue, Cleveland, OH 44115

This continuing education seminar is for the benefit of the professional estate planning community in Northeast Ohio. The program will include four 60-minute technical sessions each afternoon (8 different relevant topics) presented by outstanding estate planning specialists. Application has been made for 4 or more credit hours for each profession participating in each full afternoon session. Participation in both sessions will yield 8 or 9 credit hours, depending upon your profession.

**Wednesday, September 14th presentations include:**

**Charitable Planning in Business**
- Donald Laubacher, CPA
- Sequoia Financial Group
- Alane Boffa, CPA
- Cohen & Company

**Succession**
- 20 Common Annuity Planning Mistakes and How to Avoid Them
- Scott Passias, CFS
- Lincoln Financial Distributors

**Estate Tax Considerations for Real Estate Investors**
- Frederick N. Widen, Esq.
- Ulmer & Berne LLP

**Charitable Planning in Business**
- Alane Boffa, CPA
- Cohen & Company

**Succession Planning for Closely Held Businesses**
- James Aussem, Esq.
- Cavitch Familo & Durkin

**Thursday, September 15th presentations include:**

**Charitable Planning Developments:**
- Design With an Aging Eye in Mind
- Charles M. Miller, ESQ.
- Case Western Reserve University

**Retirement Plans and their Relationship to Asset Protection Planning**
- Robin Baum, CPA
- Zinner & Co. LLP

**Portability:**
- Estate Planning in the New Frontier and the Final Regulations
- Patrick J. Saccogna, Esq.
- Thompson Hine LLP

**Modifying and Terminating Trusts:**
- PSA, Decanting, or Court Order?
- Robert M. Brucken, Esq.
- Baker & Hostetler LLP

---

**Steering Committee**

P. Thomas Austin, CPA, Karen Greco, Esq., Bradley Schlang, CFP and Culeen Carey

---

□ Yes, I will attend: □ September 14 ($35.00) □ September 15 ($35.00)

On Line: [http://eps.gccbsa.com](http://eps.gccbsa.com)

Enclosed is my check made payable to BSA, GCC and Mail to: GCC, 2241 Woodland Avenue, Cleveland, OH 44115

Attention: Heather McMillan – 11th Annual Estate Planning Seminar or to heather.mcmillan@scouting.org

Name: ________________________________________________________________

( Please Print)

Best contact number: (______)__________ Email: _____________________________ @ _______________________

□ Please charge my credit card ______Visa _____MasterCard _____Discover _____Amex

Expiration Date: ______/______ Signature: _______________________________________

Questions regarding the seminar ~ please contact Culeen Carey, (216)458-8948 or culeen.carey@scouting.org