

# The Gathering 2007

Let's gather together to share insights, education and collegiality. The Gathering is a yearly event primarily for advisors in Estate and Business Planning. In today's complex world, no one person can be an expert in all areas of estate, business, tax, and wealth planning.

The format of these two-day workshops is designed for team-teaching in an informal setting, where dialogue and participation with the audience is as important as the materials prepared by the presenters. The presenters are selected because they are experts in their field who enjoy teaching and who give of themselves and their time. Their unique skills, experience, expertise and judgment are truly invaluable to the audience and are extraordinarily well-received!

## Keynote Speakers:

Robert S. Keebler, CPA, MST  
David K. Cahoone, Esq.

## Moderator:

Joseph J. Strazzeri, Esq.

## Dates:

February 1 and 2, 2007

## Participation Fee:

\$520.00

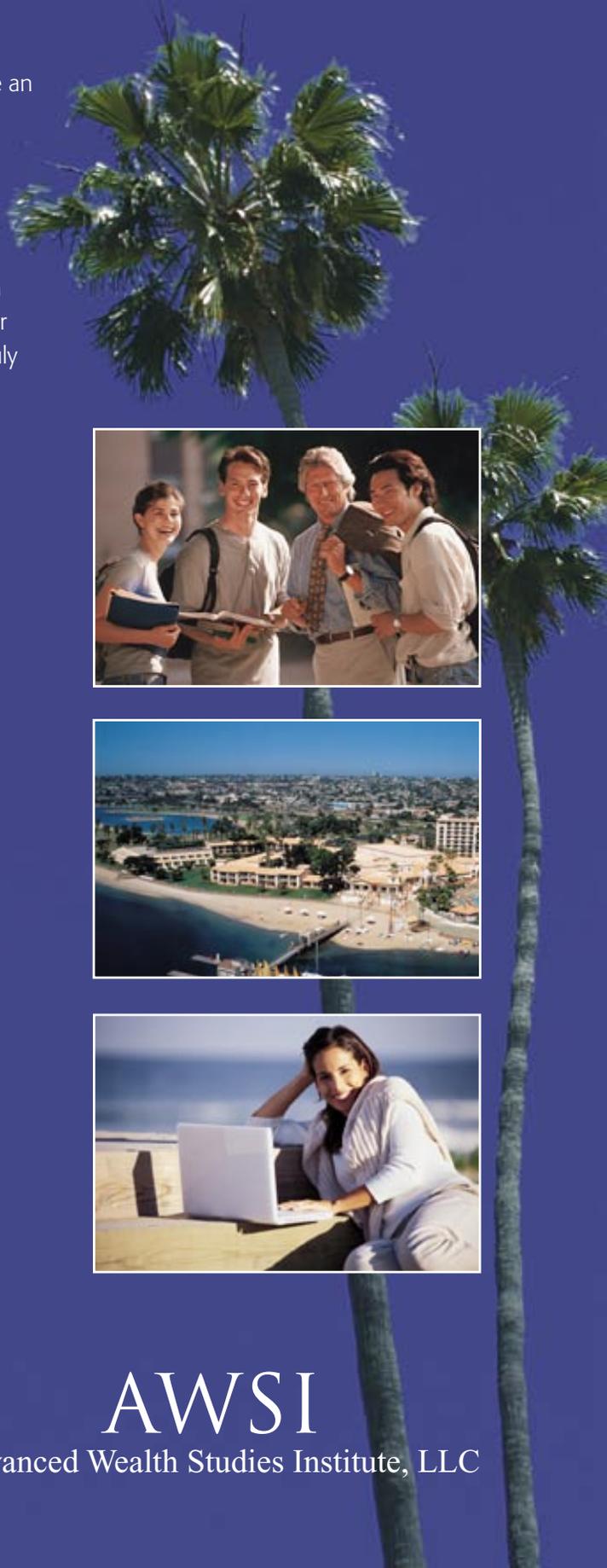
## Program Location and Accommodations

The Hilton San Diego Resort  
1775 East Mission Bay Drive  
San Diego, CA 92109  
1 (800) HILTONS or 1 (800) 445-8667  
[www.sandiegoresort.hilton.com](http://www.sandiegoresort.hilton.com)

Southern California Institute Room Rate:  
\$229 single or double occupancy

## To Attend:

Please RSVP by calling (858) 200-1911 or  
e-mail: [events@scinstitute.org](mailto:events@scinstitute.org)  
For more information on The Gathering  
please visit our website at [www.scinstitute.org](http://www.scinstitute.org)



**AWSI**  
Advanced Wealth Studies Institute, LLC

# The Gathering Schedule of Events

## Thursday, February 1, 2007

- 7:30 am – 8:00 am**     **Welcome and Registration**
- 8:15 am - 8:30 am**     **Introduction and Overview of the Days and Nights of The Gathering**  
**David K. Cahoone, Esq., Stephen J. Mancini, Esq., and Joseph J. Strazzeri, Esq.**
- 8:30 am - 10:00 am**     **What's New in Estate and Wealth Transfer Planning**  
**David K. Cahoone, Esq., and Friends**

Our fourth annual current developments program will focus on those things that are affecting our financial advisor, CPA, insurance professional, trust officer and attorney practices. In a lively, highly interactive session we will share those things that are practical and relevant in 2007 and beyond that will bring real value to our clients as we learn together what's new, what we didn't know, and what has changed from what we thought we knew. The session will include reports on the key presentations from the 41st annual Heckerling Institute on Estate Planning held in January 2007. We will also provide a briefing on a sense of what was important to the thousands of attorneys, financial advisors, life insurance professionals and CPAs who attended the 2007 Heckerling Institute.

- 10:00 am - 10:20 am**     **Break**
- 10:20 am -11:00 pm**     **Continuation of What's New in Estate and Wealth Transfer Planning**  
**David K. Cahoone, Esq., and Friends**
- 11:00 am – 12:30 pm**     **Captive Insurance Companies**  
**W. Vito Lanuti, Esq., and Daniel J. Wexler, Esq.**

Do you have business owners that can use business deductions of \$500,000/yr. or more? Would they like to protect hard earned profits from lawsuits? Do they need more advance estate planning options because they are uninsurable or don't want to pay gift tax liabilities associated with large life insurance premiums? Would you like creative solutions to these problems? Join Vito and Danny in an introductory presentation on how Captive Insurance Companies can be used to solve some or all of these problems... and more.

- 12:30 pm - 2:00 pm**     **Sponsored Lunch – Marketing Magically**  
**Mark Merenda, CEO, and Kimberly Lee, Esq.**

Lots of attorneys and advisors do seminars, but most do them badly. Marketing expert Mark Merenda of SmartMarketing and estate planning attorney Kimberly Lee of Indian Wells, California will tell you how they used an aggressive program of "retail" seminars to increase revenues 700 percent between 2003 and 2005. You'll learn why seminars are still the best method for marketing to the public; how to promote and fill the seminar; how to give a great presentation; and the process for obtaining the maximum number of qualified appointments.

- 2:00 pm - 3:20 pm**     **Paying for Life Insurance – Let Me Count the Ways**  
**Scott Gunderson, Esq., and Patricia Tanner, CFP, CLU, ChFc**

A major obstacle in using life insurance as part of an overall estate plan for older, affluent clients is the high premium cost, in addition to gift tax costs associated with those premiums. This presentation will explore ways to pay these high premiums efficiently through gifts, premium financing (recourse and non-recourse), secondary market sales and split dollar arrangements. Case studies will be used to illustrate the various techniques.

- 3:20 pm - 3:40 pm**     **Break**
- 3:40 pm - 5:00 pm**     **Income Tax Strategies for Business Owners**  
**Carl Waldman, Esq., and Stan Miller, Esq.**

Income tax planning takes on new relevance with the strong possibility that historically low tax rates will soon rise. We'll examine some time-tested strategies that benefit business owners as well as others that may be more controversial. This presentation will help us become better able to serve our clients and allow us to be versed with what is being promoted to our clients.

- 6:00 pm - 11:00 pm**     **"Circle of Friends" Black-Tie Optional Charity Event**

On this night, The Southern California Institute will host our "Circle of Friends" Roaring 20's Gatsby Gala at the Hilton San Diego Resort. This annual event is an appreciation night for Laureates, Fellows and Members of the Institute, as well as their family, clients and friends. "Circle of Friends" will be an elegant evening offering cocktails, dinner, music, silent and live auctions, and casino style gaming. Dress is "black tie optional" and costumes are encouraged, all proceeds will benefit the San Diego Chapter of the Muscular Dystrophy Association.

## Friday, February 2nd, 2007

- 9:00 am - 10:30 am**     **The Mathematics of Estate Planning**  
**Robert S. Keebler, CPA, MST**

Many planners understand the basic advantages of transactions such as GRATs, SCINs, and sales to grantor trusts. What many do not understand, however, are the quantitative "forces" that make these transactions work. Once understood from a quantitative perspective, it is easier to effectively design a successful overall estate plan. Bob Keebler will lead us in a discussion of the mathematics behind the most popular estate planning transactions used today and how these transactions can be used in combination with each other so as to create the perfect hedge against estate and gift taxes.

- 10:30 am - 11:00 am**     **Break**
- 11:00 am – 12:30 pm**     **Retirement Planning Update**  
**Robert S. Keebler, CPA, MST, John Jenkins, CFP®, CSA, EA and Jeff Dundon, Esq.**

What everyone needs to know about the changes in retirement planning resulting from the recently enacted Pension Act. A "big picture" overview of the opportunities and pitfalls we all encounter when advising clients on planning for their retirement.

- 12:30 pm - 2:00 pm**     **Lunch**
- 2:00 pm - 3:00 pm**     **The Laureate "Hour"**  
**David K. Cahoone, Esq., Stephen J. Mancini, Esq., and Joseph J. Strazzeri, Esq.**

The Power of Collaboration- How to better work with the relationships in the room and in your community.

- 3:00 pm – 3:30 pm**     **Heckerling Report: Putting Heckerling into Practice**  
**WealthCounsel Members**

For a number of years WealthCounsel members have prepared reports on each session of the annual Heckerling Institute of Estate Planning. This year we are honored to have a number of the reporters share with us what they learned that is important to our clients and our professional lives.

- 3:30 pm- 3:45 pm**     **Break**
- 3:45 pm- 4:30**     **Heckerling Report: Continuation of Putting Heckerling into Practice**  
**WealthCounsel Members**
- 4:30 pm - 5:30 pm**     **Putting Heckerling into our Documents**  
**Lew Dymond and Friends**

Lew and his friends will show us how they have taken what was discussed at Heckerling and incorporated it into WealthDocs to keep us on the cutting edge.

- 5:30 pm - 7:00 pm**     **Relaxing and Sharing with Friends and Colleagues**

Please join some of the presenters and attendee guests around the pool or at the bar to spend some extra time getting to know each other, talking over the programs, or just relaxing before the trip home.



"Circle of Friends"