CEPC 2019 BASICS COURSES

As a benefit to CEPC members, the Chicago Estate Planning Council (CEPC) is presenting an exciting training program geared for individuals with 0-5 years of experience in the estate planning field. This program is for both members and non-members who are associated with CEPC members, and will be taught at an introductory level. Give your junior colleagues an opportunity to learn what they weren't taught in school, to hone their basic drafting skills, and to review estate, gift, and trust tax return preparation.

The remaining program is divided into four - 3.5 hour parts: 9:00 a.m. to 12:30 p.m.
A Continental Breakfast is available beginning at 8:30 a.m.
The Northern Trust, 50 South LaSalle St., Chicago, IL

Part 1 - November 15, 2018

CLOSED

An Introduction to Estate Planning – November 15, 2018
Just Beginning or a Few Years Out – this course is for you.

Part 2 - January 9, 2019

Overview of Estate, Gift and Generation-Skipping Transfer Tax
Presented by:
Christine Quigley, Schiff Hardin LLP
Steve Bonneau, The Northern Trust Company

Part 3 - January 23, 2019

Fiduciary Responsibility and Income Tax Matters
Overview of the Illinois Trust and Trustees Act
Presented by:
Susan Bart, Schiff Hardin LLP
Fiduciary Income Tax and Accounting for Trusts and Estates –
Presented by:
Michelle Huhnke, SFG&H
Paige Goepfert, Andersen Tax LLC

Part 4 - January 30, 2019

Drafting Estate Planning Documents
Wills, Revocable Living Trusts, and Powers of Attorney; Selection of Fiduciaries; Discretionary Standards; Trustee Powers; Tax Planning; and Other Drafting Considerations
Presented by:
Erica E. Lord and Reetu Pepoff, The Northern Trust Company;
Natalie Perry, Rathje Woodward LLC

Part 5 - January 30, 2019

Putting it All Together:
Case Studies on Integrating Client Planning and Reporting Tax Return
Presented by:
Jeffrey Bergman, Charles Schwab Bank
Rebecca Solomon, Plante Moran

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Freeborn — Your Future Is Our Purpose
JNJ & Associates, Ltd
Northern Trust
plante moran — audit · tax · consulting
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CEPC 2019 BASICS COURSES

ESTATE PLANNING FUNDAMENTALS TRAINING PROGRAM

REGISTRATION

Space is limited for this program – To register online, please
Click Here or complete the attached registration form below.

Registration Deadline

2019 Basics Courses (Parts 2-5) - December 21, 2018.

When: January 9, 23, 30 and February 6, 2019 Basics Course – Parts 2-5
8:30 – 9:00 a.m.: Continental Breakfast
9:00 – 12:30 p.m.: Course Presentation

Where: The Northern Trust Company, 50 S. LaSalle St., Chicago (Global Conference Center)

Continuing Education Accreditation
This program is pending continuing education approval for CLE, CPA, CFP, CPWA CTFA and Insurance

Registration Fee – Includes all instruction, course materials and continental breakfast. This program is for both members, and non-members who are associated with CEPC members

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If paying by check, please complete the registration below and return with your check, by the registration deadline above, made payable to: CEPC, 330 N. Wabash Avenue, Suite 2000, Chicago, IL 60611; Attn: Kathleen Callahan

Name

ATTY, CFP, CPA, CTFA, Ins., Other

Company

Address

City/State/Zip

Email

Telephone

Parts 2 - 5 Registration Fee - $500	______
Part 2 Only Registration Fee - $150	______
Part 3 Only Registration Fee - $150	______
Part 4 Only Registration Fee - $150	______
Part 5 Only Registration Fee - $150	______
Total:	______

Please contact Kathleen Callahan at 312.673.4707 or email info@cepcweb.com with any questions.

Our thanks for the generous support of our sponsors for 2018-2019 CEPC Estate Planning Fundamentals Training Program

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