

WILCOX & SIKELIANOS, P.C.

Annual Estate Planning Update 2014

Thursday, May 15, 2014
7:45 a.m. – 5:00 p.m.

New Mexico State Bar Complex
5121 Masthead, N.E.
Albuquerque, New Mexico 87109

Please donate \$75 to the Independent Community Foundation Inc. to register for this seminar. Please mail your donation to Wilcox & Sikelianos, P.C. to confirm your registration.

Seating is limited, so you must RSVP to attend.

Professional Credit Approved (CLE, CE and CFP)

Agenda

Sign-in		7:45 – 8:30 a.m.
Estate and Gift Tax Update 2014	Vickie R. Wilcox, J.D., LL.M.	8:30 – 9:30 a.m.
Estate Planning to Protect Against (Non-IRS) Predators (Keeping Tina the Trophy Wife out of Your Family's Assets)	Vickie R. Wilcox, J.D., LL.M.	9:30 – 10:00 a.m.
Break		10:00 – 10:15 a.m.
Advising and Protecting the Elderly and Their Assets and Investments: Elder Fraud and Red Collar Crimes	Richard Brody, CPA, CFE, CFF, CGMA, FCPA Cynthia S. Sikelianos, J.D.	10:15 – 11:45 a.m.
Lunch		11:45 – 12:45 p.m.
What Does a Trustee Do Exactly? From Portfolio Balance to Ascertainable Standards, an Overview	Vickie R. Wilcox, J.D. LL.M. Panel of Independent Corporate Trustees Moderator: Jamie Lewinger	12:45 – 2:15 p.m.
Protecting your Intangible Assets: from Valuation to Transfer	Jeffrey D. Myers, J.D.	2:15– 3:15 p.m.
Break		3:15 – 3:30 p.m.
Questions and Answers from the Day's Speakers		3:30 – 4:00 p.m.
Ethics: This Stuff Happens Every Day!	Cynthia S. Sikelianos, J.D.	4:00 – 5:00 p.m.

Presented By:

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