

WILCOX LAW FIRM, P.C.

“PROVIDING EXCEPTIONAL ESTATE PLANNING SERVICES FOR EXCEPTIONAL CLIENTS”®

Annual Estate Planning Update 2015

Thursday, May 14, 2015
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 Law Firm, P.C. to confirm your registration.

Seating is limited, so you must RSVP to attend.

Professional Credit Pending (CLE, CE, CFP, CPA and Insurance (Ethics))

Agenda

Sign-in		7:45 – 8:15 a.m.
Estate and Gift Tax Update 2015	Vickie R. Wilcox, J.D., LL.M.	8:30 – 9:30 a.m.
It's All About the Basis? Estate Planning in 2015: Income Tax Planning, IRA Beneficiary Designations After <i>Clark</i> , Charitable Giving, Grantor Trusts, Etc.	Vickie R. Wilcox, J.D., LL.M.	9:30 – 10:30 a.m.
Break		10:30 – 10:45 a.m.
All You Ever Wanted to Know About Real Estate With Respect to Estate Planning and Probate: Ask the Expert	Scott E. Turner, J.D., Certified Real Estate Specialist	10:45 – 12:00 p.m.
Lunch: Pizza, Drinks, and Networking in the Charity Exhibit Hall		12:00 – 1:00 p.m.
Website Disasters (and How to Avoid Them): Practical Advice for Lawyers, CPAs, Insurance Agents, and Financial Advisors	Seth J. Gardenswartz, J.D. Jeffrey D. Myers, J.D.	1:00 – 2:30 p.m.
Break		2:30 – 2:45 p.m.
How to Die in New Mexico: Update on Death with Dignity, Living Wills, HIPAA Releases, POLST, DNR/DNH Orders, Etc.	Vickie R. Wilcox, J.D., LL.M.	2:45 – 3:45 p.m.
Ethics: Advisor Collaboration in Estate Planning: Interdisciplinary Ethical Considerations for Estate Planning Professionals/Best Practices for a Team Approach	Jesse D. Gallegos, J.D.	3:45 – 5:00 p.m.

Presented By:

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