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5th Annual Intergenerational Wealth Planning Seminar
November 18, 2009

Planning for the Generations: Wealth Preservation and Transfers in 2010

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EMPIRE VALUATION CONSULTANTS

Planning for the Generations: Wealth Preservation and Transfers in 2010

Let's face it – Baby Boomers are about to change the world - again. As the first wave of the Boomer generation begins to turn 65, not only will many deal with daily challenges of being caretakers for aging parents, but all must evaluate their own retirement goals, long-term care and estate planning needs. Tax increases will be real, and significant. Financial and estate planning clients face unprecedented challenges, as do advisors, and the need for a well structured estate plan has never been stronger.

Through a unique case study approach, our panel will bring to life a plan that illustrates how advisors can work together using cutting-edge techniques to help solve the problems endemic to the Boomer generation. The presenters will provide documents, illustrations, valuations and other materials to highlight the practical implementation of each element of the plan.

5th Annual Intergenerational Wealth Planning Seminar

Date: Wednesday, November 18, 2009
Time: 8:00am - 12:30pm
Continental Breakfast Provided
Cost: Free
Location: Albany Country Club
300 Wormer Road, Voorheesville NY

Kindly RSVP by Nov. 13, 2009 as Seating is Limited
Call: 518.459.2100 or *Toll-Free* 866-951-PLAN
Email: btromans@pierrolaw.com

Program Topics and Speakers Include:

An Estate Plan for Tech Valley Baby Boomers
Louis W. Pierro, Esq. & Philip A. Di Giorgio, Esq. - Pierro Law Group

This presentation will demonstrate how to construct and execute an estate plan for a "Tech Valley" Baby Boomer, including planning with a start-up company, creative life insurance planning using private split dollar arrangements, comparison of split dollar loan to Grantor Retained Annuity Trusts and Sales to an Intentionally Defective Grantor Trust.

Valuing Start-Up Entities
Chuck Coyne, ASA - Empire Valuation Consultants

This presentation will cover the factors an independent business appraiser considers in determining fair market value of a start-up business for estate and gift tax purposes.

Tools to Fuel the Life Insurance
Richard Blaser - The Hartford

This presentation will cover a number of ways in which high-net worth clients can leverage their purchase of life insurance, including a discussion of the NEW 2010 1035 exchange rules and the use of private split dollar financing.

Planning for the Sandwich Generation
Kim Verner, Esq. & Jane-Marie Schaeffer, Esq. - Pierro Law Group

This presentation includes an overview of the legal planning considerations when caring for aging parents, family members with special needs and children, including use of surrogate decision makers and Supplemental Needs Trusts.

Delaware Trusts as Intergenerational Planning Tools
Jeff C. Wolken, JD - Wilmington Trust

This presentation will cover some of the unique aspects of Delaware's trust laws that allow for planning for multiple generations.

Charitable Planning for Retirement Assets
Louis W. Pierro, Esq. - Pierro Law Group

This presentation will address the special planning Boomers require because of their accumulation of wealth inside of retirement accounts.

Question & Answers