November 19, 2015 Meeting

The next regular program for the **Knoxville Estate Planning Council** will be held on Thursday, November 19, 2015, at Calhoun's on the River.

Meet and greet 5:15 PM | Dinner: 5:45 PM | Presentation: 6:00 PM

Complex Planning at the Intersection of Income and Transfer Taxes — Don't Bring a Spork to a Knife Fight

Speaker: Thomas J. Pauloski, J.D., National Managing Director
Wealth Planning and Analysis Group, Bernstein Global Wealth Management

Planning at the intersection of income and transfer taxation can be complicated. In this compendium of advanced wealth transfer case studies, Tom Pauloski, National Managing Director of Bernstein's Wealth Planning and Analysis Group and a former estate planning attorney, will discuss the history of federal wealth transfer and income taxes, projected effect of inflation on applicable exclusion, funding GRATs with discounted assets, post-transaction planning, and basis shifting strategies in the current environment. Sophisticated wealth forecasting software will be used to illustrate key findings.

Course Objective: Participants explore complexities and propose potential solutions to some of the toughest problems estate planners face today.

THOMAS J. PAULOSKI is National Managing Director for Wealth Planning and Analysis, the research division of Bernstein Global Wealth Management's Private Client Group. He works with private clients and their advisors on wealth transfer strategies, focusing on tax-efficient wealth management and asset allocation decisions. Previously, Tom was a partner at the Chicago law firm of Winston & Strawn LLP, where he concentrated his practice in estate, tax, and business planning. Tom received his bachelor of science degree in environmental engineering from Northwestern University, and his juris doctor, *magna cum laude*, from Loyola University Chicago School of Law, where he served as editor-in-chief of the *Loyola Law Journal*. Tom has been an adjunct professor at Loyola University Chicago School of Law and has taught estate planning classes at Northwestern University Law School.

Bring a Guest!

Attention Members! This upcoming year KEPC will give you an opportunity to invite a guest for **FREE**. KEPC is always looking for new members in the CPA, Financial, Trust and Special categories. If you know someone who would be interested in becoming a member and would like to attend a meeting, this is the perfect opportunity. ***One guest per member per meeting. Guests are limited to one meeting per year at no cost.***

Please RSVP no later than 12:00 PM Monday, October 16, 2015. Reservations taken after October 16, 2015, will **NOT** include dinner. If a reservation needs to be canceled, notification must be sent no later than 12:00 PM Monday, October 16, 2015, or the member will be billed $25 for the cost of the dinner. Guests are welcome to attend the meeting with a member — $10 for students and emeritus members. If a guest reservation needs to be canceled, notification must be sent no later than 12:00 PM Monday, October 16, 2015, or the member is responsible for the $25 or $10 charge. To register for this course, go to kepctn.org, or call 865-474-7360.

Knoxville Estate Planning Council next meeting scheduled for January 21, 2016

Delivery Method: Group Live
Program Level: Basic
Prerequisites: None
Advanced Preparation: None
CLE Credit: 1 hour General
CLU Credit: 1 hour General
CPE Credit: 1 hour Tax

Due to this program being presented free of charge, there will be no refunds issued. For more information regarding refund, complaint and program cancellation policies, please contact our offices at 865-474-7360.

Knoxville Estate Planning Council is a registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org

Knoxville Estate Planning Council

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