

REGISTRATION

19th Annual Seminar
on Estate & Tax Planning:
Federal Estate Tax Changes and Roth IRA
Conversions in 2010

Wednesday, May 5, 2010

Registration: 8:30 - 9:00 a.m.

Seminar: 9:00 a.m. - 12:15 p.m.

Lioncrest on Biltmore Estate, Asheville, NC

Fee: \$100

Please note: Fee increases to \$120 for
registration after April 30 or at the door.

Please detach and mail this registration form
and check payable to CFWNC by April 30, 2010 to
The Community Foundation of Western North
Carolina, P.O. Box 1888, Asheville, NC 28802.

Full Name _____

Name for Nametag _____

Profession _____

Credit Requested: CLE CPE
 CFRE Insurance
 CFP CTFA

NC State Bar # _____

NPN # _____

CFP # _____

Firm _____

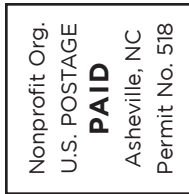
Mailing Address _____

City, State, Zip _____

Phone _____

Email address _____

Registration confirmation will be sent via email.



The Community Foundation
of Western North Carolina

19TH ANNUAL

Estate & Tax Planning Seminar

Federal Estate Tax
Changes and Roth IRA
Conversions in 2010:

Updates and Developments

Featuring

Christopher Hoyt, JD

Professor, University of Missouri-Kansas
City School of Law

Wednesday, May 5, 2010
Lioncrest on Biltmore Estate
Asheville, NC

For professionals guiding clients through tax, estate and financial planning decisions, this is a year of unprecedented opportunity and uncertainty. This presentation will focus on structuring conversion of IRA 401(k) and 403(b) accounts to Roth IRAs, strategies for “undoing” conversions, and using charitable giving to mitigate tax impacts. **Professor Hoyt** will also bring his insider’s view of the estate tax situation and expertise for handling planning decisions that have to be made in unclear circumstances.

This basic course has no prerequisites or advance preparation required and is offered in a lecture format.

DATE, TIME & LOCATION

Wednesday, May 5, 2010

Registration: 8:30 – 9:00 a.m.

Seminar: 9:00 a.m. – 12:15 p.m.

Lioncrest on Biltmore Estate, Asheville

From Interstate 40 East:

Take I-40 east to Asheville. Take exit 50 (US Highway 25), then turn left at the traffic light after exiting. Stay in the left lane and follow signs to the Biltmore Estate entrance.

From Interstate 40 West:

Take I-40 west to Asheville and take exit 50B (US Highway 25 North). After exiting stay in the left lane and follow signs to the Biltmore Estate entrance.

Cost: \$100 or
\$120 after April 30 registration deadline

Visit www.cfwnc.org or
call (828) 254-4960 for more information.

SPEAKER

Professor Christopher R. Hoyt

teaches courses in the areas of federal taxation, business organizations, retirement plans, and tax-exempt organizations at the University of Missouri-Kansas City School of Law.

He has served as Chair of the American Bar Association’s Committee on Lifetime and Testamentary Charitable Gift Planning (Section of Probate and Trust) and on the editorial board of *Trusts and Estates* magazine. He is a frequent speaker at legal and educational programs and has been quoted in numerous publications, including *The Wall Street Journal*, *Forbes*, *MONEY Magazine* and *The Washington Post*.



CONTINUING EDUCATION CREDIT

Continuing education credit (3 hours) is recommended or pending for the following. Credits will be confirmed at the event.

- NC State Bar, Board of Continuing Legal Education (CLE)
- Certified Financial Planner Board of Standards (CFP)
- NC Department of Insurance (11 NCAC 06A.0809) (ICEC)
- ICB/Certified Trust and Financial Advisor (CTFA)
- CFRE International (CFRE)
- NC State Board of CPA Examiners (21 NCAC 8G.0400) (CPE)

CFWNC is registered with the NC State Board of CPA Examiners as a sponsor of continuing professional education. Complaints or comments regarding registered sponsors may be addressed to the North Carolina State Board of CPA Examiners, PO Box 12827, Raleigh, NC, 27605-2827.

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ABOUT THE COMMUNITY FOUNDATION

The Community Foundation of Western North Carolina partners with financial planners, attorneys, accountants and insurance professionals to provide charitable giving options for their clients.

Clients who create funds with the Foundation receive professional administration, significant tax advantages, and the opportunity to make a difference in their community. CFWNC is a public charity and gifts are tax deductible. The Foundation currently manages more than \$147 million in charitable assets.