**Our Faculty:**

**Steve G. Kluthe**, is an Agent with the Knights of Columbus. Steve Kluthe's Team through the Knights of Columbus provides a streamlined comprehensive and authoritative service in the art and science of financial services to Catholic families in Nebraska. Steve is an Fraternal Insurance Counselor Fellow (FICF). The FICF designation is an advanced award granted to only those field representatives who have shown the highest levels of dedication required to achieve knowledge in the more advanced areas of life underwriting.

**Jeffrey T. Palzer** is an attorney with the Omaha law firm of Kellogg & Palzer, P.C., where he practices in the areas of estate planning, elder law, probate, trust administration, small business planning and business law, and adoption. He has worked in the areas of estate planning and elder law since 1994. Jeff has presented at numerous seminars on estate planning, special needs trusts and elder law for groups including the Nebraska Association of Financial Planners, National Business Institute, and the Schools of Banking.

**Patrick K. Tucker** is a Financial Planner and President of Meridian Management, Inc. Meridian Management has provided unbiased financial advisory services since 1998 and is a federally registered investment advisor. Meridian Management is led by Patrick Tucker. Patrick has been providing guidance to his clients in their pursuit of life and financial prosperity for nearly two decades. Mr. Tucker was educated in Accounting and Finance at the University of St. Thomas in St. Paul, Minnesota.

**Herman D. Weist** is a retired Certified Public Accountant who consults on tax and small business issues. He has practiced in the areas of small business, taxation, and non-profit entities for over 60 years and is past president of the Nebraska Society of Certified Public Accountants. He is currently a Director of the American National Bank and serves on the investment and finance committees of a number of non-profit entities.

**REGISTRATION (Complete and mail with payment to IPF Planned Giving Committee)**

**Name**________________________________________

**Firm** ________________________________________

**Profession:** ☐Attorney ☐CPA ☐Insurance ☐Financial ☐Other____________________________

**Address:**______________________________________

**City/State/Zip:**__________________________________

**Phone:** ______________________

**Email:**__________________________

**Payment by check only - $50 *Make checks payable to "IPF"***

***About the Institute for Priestly Formation***

The Institute for Priestly Formation, located on the campus of Creighton University, was founded to assist bishops in the spiritual formation of diocesan seminarians and priests in the Roman Catholic Church. The Institute responds to the need to foster spiritual formation as the integrating and governing principle of all aspects of priestly formation. IPF directly serves diocesan seminarians and priests as well as those who are responsible for diocesan priestly formation.


**IPF Planned Giving Committee**
**10828 Old Mill Road, Suite 6**
**Omaha, NE 68154**
**402-330-8001**
**www.priestlyformation.org**


# Advanced Estate Planning and Charitable Giving

**Continuing Education**

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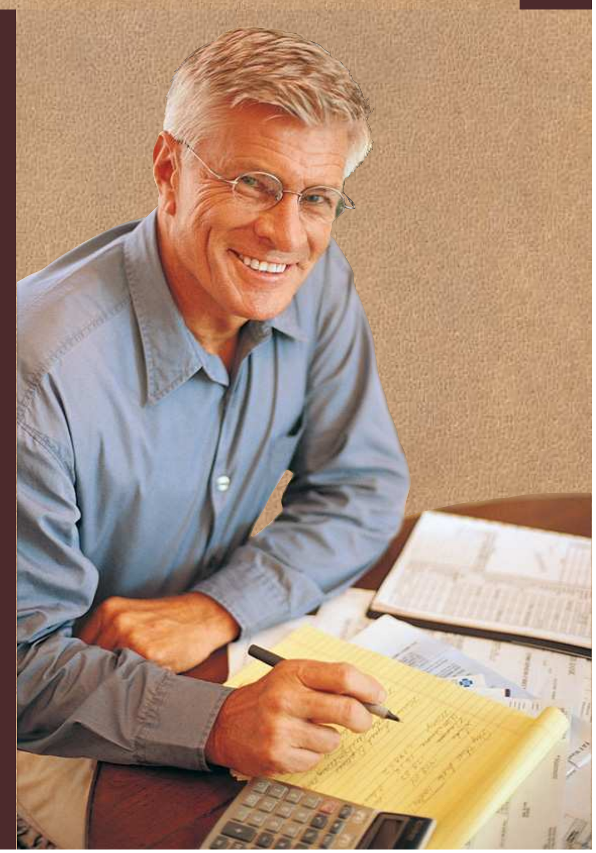

## Learn Techniques for Preserving and Protecting Your Clients' Estates and Maximizing Charitable Giving

**Why Attend:** Our clients work hard, save diligently, and deserve to get the maximum benefit passed to their heirs. But, with the complex maze of tax, estate, probate, and trust law, it is challenging for advisors to chart the best course for their clients. Enroll in IPF Planned Giving Committee's half day advanced estate planning seminar to get the latest information and tools to best advise your clients.

**Who Should Attend:** This seminar is designed for attorneys, accountants, trust officers, financial planner, life insurance professionals.

### CONTINUING EDUCATION CREDIT

**Attorneys:** Nebraska-MCLE—*Approved* for 3 hours including 1 hour of Ethics
**CPAs:** *Approved* for 3 hours including 1 hour of Ethics
**Insurance:** *Approved* for 3 hours including 1 hour of Ethics

# Course Content

***Ethical Estate Planning: Putting the client first*** -
Jeffrey T. Palzer 8:00—9:00 am

- Who is the client? The person signing the document or the child sitting next to them?
- Duty of Loyalty and Duty of Confidentiality
- Competency Issues and Estate Planning
- Avoiding the Will Contest BEFORE it happens
- Working with other Professionals - Strategic Alliances versus Ethical Obligations

***Advanced Tax Strategies and IRA Tax issues*** -
Herman D. Weist (9:15—9:55)

- Taxation of Regular IRA Accounts at Death
- Estate tax issues and Nebraska Inheritance Tax
- RMD status or not? Rules for those who inherit the IRA
- Taxation of IRA Distributions to beneficiaries and how to avoid IRS penalties
- Advantages of Charitable Giving with qualified funds

***Charitable Giving - Maximizing donation AND taxpayer benefits*** -
Patrick K. Tucker (9:55-10:35)

- Charitable Giving Basics
- Beneficiary Designation
- Charitable Trusts and Annuities
- Charitable Lead Trust
- Leveraging donation methods to maximize deductibility and benefit to the charity

***Benefits and Flexibility of using Life Insurance in your Estate Planning*** -
Steve G. Kluthe (10:50-11:30)

- How Insurance impacts Charitable Trusts, Irrevocable Life Insurance Trusts and Special Needs Trusts
- Flexibility of the various types of life insurance -- finding the right fit
- How insurance can create a positive legacy

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|---|---|
| **SEMINAR:** | **Advanced Estate Planning and Charitable Giving for Professionals** |
| **DATE:** | November 30, 2012 |
| **LOCATION:** | Mainelli Center, St. Robert Bellarmine Parish,<br>11802 Pacific Street Omaha, NE 68154 |
| **TIME:** | 7:30 Registration;<br>7:45 video presentation and introductions<br>8:00 to 11:30 Seminar (3 hours of presentation and two 15 minute breaks) |
| **COST:** | **$50.00** (includes seminar manual) |