

The Salvation Army will once again Sponsor the Estate & Charitable Gift Planning Institute which will be held on **Tuesday, September 16, 2014.**

Please SAVE THE DATE and make plans to attend a location nearest you.

CONTINUING EDUCATION CREDITS. MCLE, CLE, CPE, CFP and CTFA continuing education credits will be earned for attending. Credit hours will vary for Illinois and Iowa. These will be announced at a later date as they become available.

In the past, the seminar was approved for approximately 6-7 Continuing Education Credit hours including 1 hour of ethics.

2014 SEMINAR SPEAKERS:

- **Ann B. Burns**
- **Samuel A. Donaldson**



“New Paradigms in Estate and Charitable Planning”

Estate planning is constantly changing as income taxes increase, estate taxes are reduced, portability takes hold, and the economy recovers. Explore traditional and new planning techniques designed with flexibility in mind to address the new paradigm.

- Recent tax developments & case law updates
- Plans for small, medium and large estates
- Business advice for succession planning
- Effective & efficient charitable strategies
- Ethical considerations in representing Families and their entities

ETHICS SESSION

9:30 a.m. to 10:30 a.m.

SESSION I

10:30 to Noon

LUNCH

12:00 Noon to 1:00 p.m.

SESSION II

1:00 to 3:00

DISCUSSION/QUESTIONS

3:00 to 3:30

(More specific agenda items will be available closer to the seminar).

In the past, Webcast Locations have included the following cities:

ILLINOIS:

- BLOOMINGTON
- PEORIA
- MACOMB
- MORRIS
- OTTAWA
- CANTON
- CHAMPAIGN
- KANKAKEE
- DECATUR
- GALESBURG
- SPRINGFIELD

IOWA:

- CEDAR RAPIDS
- CLINTON
- WATERLOO
- QUAD CITIES

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Mission Statement

The Salvation Army, an international movement, is an evangelical part of the universal Christian church. Its message is based on the Bible. Its ministry is motivated by the love of God. Its mission is to preach the gospel of Jesus Christ and to meet human needs in His name without discrimination.

PLEASE SAVE THE DATE!

The Salvation Army Presents:

The 22nd Annual Estate & Charitable Gift Planning Institute

“New Paradigms in Estate and Charitable Planning”

Tuesday,

September 16, 2014

Broadcast live from

Minneapolis to:

A LOCATION NEAR YOU!