

Estate Planning Overview from the Simple to the Complex (from Probate to Generation Skipping Transfer Tax)

February 24, 2011
8:00 a.m. – 5:00 p.m.

State Bar of New Mexico
5121 Masthead, N.E.
Albuquerque, New Mexico 87109

There is no fee for this seminar. However, making a charitable donation of \$75 to a charity of your choice is encouraged. Please consider donating to:

- ◆ *The University of New Mexico Foundation*
- ◆ *The Albuquerque Community Foundation*
- ◆ *Animal Humane Association of New Mexico*
- ◆ *Albuquerque Little Theatre*
- ◆ *Alzheimer's Association*
- ◆ *Senior Citizens' Law Office*
- ◆ *Make-A-Wish Foundation of New Mexico*
- ◆ *Equal Access to Justice*
- ◆ *A religious organization of your choice*

7.0 CLE Credits Approved

Other Professional Education Credits
(e.g., CFP, CPA and CE) *Pending Approval*

AGENDA

REGISTRATION		8:00 – 8:30 a.m.
Overview of the Tax Relief, Unemployment Insurance Reauthorization, and Job Creation Act of 2010	Cynthia S. Sikelianos and Vickie R. Wilcox	8:30 – 9:30 a.m.
Probate: The Basic Process (How and Why to Avoid It, if Possible)	Patricia M. Galindo	9:30 – 10:00 a.m.
BREAK		10:00 – 10:15 a.m.
Revocable Living Trusts and Ancillary Documents: The "Basic Estate Plan"	Vickie R. Wilcox and Gregory M. Segura	10:15 – 11:15 a.m.
Funding Trusts: How to Properly Title Assets, Including Qualified Retirement Account Beneficiary Designations	Cynthia S. Sikelianos and Jamie M. Lewinger	11:15 – 12:00 p.m.
LUNCH (please make your own lunch plans)		12:00 – 1:00 p.m.
Guardianships/Conservatorships: Update on New Mexico Cases	Patricia M. Galindo	1:00 – 2:00 p.m.
Irrevocable Life Insurance Trusts (ILITs): Why Insurance Continues to be a Critical Tool in Estate Planning	Cynthia S. Sikelianos	2:00 – 3:00 p.m.
BREAK		3:00 – 3:15 p.m.
Wealth Transfer Techniques in the Current Environment: How to Take Advantage of Low Interest Rates and High Transfer Tax Credit	Vickie R. Wilcox	3:15 – 4:15 p.m.
Planning for the Generation Skipping Transfer Tax: Maximize Wealth Transfers and Asset Protection Through the Generations	Vickie R. Wilcox	4:15 – 5:00 p.m.

Presented by:

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Seating is limited.
Please RSVP to attend.

Please RSVP by phone:
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