

ABOUT OUR PRESENTERS

Bryan Clontz, CFP®, CLU, ChFC, AEP, CAP, serves as the president and co-founder of Charitable Solutions, LLC. Bryan has extensive experience in planned giving consulting, charitable gift annuities, non-cash asset receipt/disposition and donor advised funds. Over the last 15 years, he has served as the director of planned giving for the United Way of Metropolitan Atlanta, director of planned giving at the national office of Boys & Girls Clubs of America and as vice president of advancement at the Community Foundation for Greater Atlanta.

David Krebs, CPA, serves as the Chief Visionary Officer of CPA Advisory Group, Inc. and is a professional author and speaker training over 7,000 accountants and small business owners each year. David has developed extensive experience in all facets of tax and personal financial planning, business plans and financing, and small business strategic planning. He has served as president of the Columbus Chapter of the Ohio Society of CPAs, was selected as Accounting Small Business Advocate of the Year in 1993, and is an active member in the American Institute of CPA's and the National Speakers Association.

William Freedman is a partner at Dinsmore & Shohl LLP and serves as an Adjunct Professor of Health Law & Policy of the Department of Health Services Administration at Xavier University. His practice focuses on health care and related regulatory compliance steps unique to the health care industry; tax and estate planning advising individuals and businesses; and employee benefits focusing on pension and welfare benefit plans. William was named Ohio Super Lawyer by Law and Politics, listed in The Best Lawyers in America®, and was the recipient of the 2010 Adjunct Faculty Member Award at Xavier University College of Social Sciences, Health & Education.

THANKS TO OUR SPONSORS

The 9th annual Professional Advisors Conference is brought to you by the following sponsors:

Community Foundation of West Chester/Liberty

First Financial Wealth Resource Group

Hamilton Community Foundation

US Bank

Flynn & Company

Middletown Community Foundation

Fairfield Community Foundation

Fund Evaluation Group

Merrill Lynch

Miami University Regionals

Millikin & Fitton Law Firm

Oxford Community Foundation

West Chester Medical Center

Working with your local community foundation, your client can enjoy the benefits of having a private foundation without all of the aggravation. Your client supplies the passion and ideas. The community foundation supplies the expertise and infrastructure. And you get the credit for supplying the perfect solution. What better way for your clients to know and witness their contributions making a difference in their community.

Non-Profit Org.
US Postage
PAID
Cincinnati, OH
Permit No. 770

Hamilton Community Foundation
319 N. Third Street
Hamilton, OH 45011
Return Service Requested

**Register
Today!**
**Free
Seminar**
**Seating is
Limited!**

Complimentary Seminar

PROFESSIONAL ADVISORS CONFERENCE

Friday, October 14, 2011

7:30 a.m. - 4:15 p.m.

Miami University
Voice of America Learning Center
7847 VOA Park Drive
West Chester, Ohio 45069
www.muohio.edu/voalc

Continuing Education Credits Pending for Accountants, Attorneys, Trust Officers, Certified Financial Planners, and Insurance Agents.

NEW: Specialized Credits for Estate Planning, Trust and Probate Law Are Pending for Attorneys.

Presented by:

usbank

FIRST
first financial wealth management
Another step on the way to success.


Hamilton
Community Foundation
Leading philanthropy... For good. For ever.


community foundation
WEST CHESTER • LIBERTY

Schedule

Friday, October 14, 2011

- 7:30 – 7:50** Registration/Continental Breakfast
- 7:50 – 8:00** Welcome/Introductions
- 8:00 – 9:30** **Creative Charitable Planning Using Non-Cash Assets**
*Bryan Clontz, President
Charitable Solutions, LLC*
- 9:30 – 9:35** Break
- 9:35 – 11:05** **Advanced Charitable Brainteasers: A Case Study Approach**
*Bryan Clontz, President
Charitable Solutions, LLC*
- 11:05 – 11:15** Break
- 11:15 – 11:45** **Plenary Lunch: Community Foundations as a Charitable Giving Partner**
- 11:45 – NOON** Break
- NOON – 1:30** **Individual, Federal and State Tax Updates**
*David Krebs, Chief Visionary Officer
CPA Advisory Group, Inc.*
- 1:30 – 1:35** Break
- 1:35 – 3:05** **Federal and State Tax Planning Strategies**
*David Krebs, Chief Visionary Officer
CPA Advisory Group, Inc.*
- 3:05 – 3:10** Break
- 3:10 – 4:10** **Health Care, Budget Reform and Family Wealth Planning**
*William Freedman, Partner
Dinsmore & Shohl LLP*
- 4:10 – 4:15** Closing Remarks

Creative Charitable Planning Using Non-Cash Assets

Advanced Charitable Brainteasers

Bryan Clontz

8:00 - 11:05 a.m.



In part one of Bryan's session, he will discuss the aspects of charitable planning using non-cash assets. He will present an overview of the non-cash market, current legislative changes, reasons why non-cash assets are declined and the top 10 non-cash questions. Bryan will then demonstrate these concepts through three case studies.

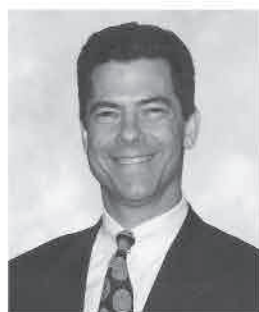
Part two will consist of a review of common charitable planning problems with uncommon solutions. Bryan will examine eight case studies to provide a wide range of information for advisors to aid their clients.

Individual, Federal and State Tax Updates

Federal and State Tax Planning Strategies

David Krebs

Noon - 3:05 p.m.



David's first session will be an in-depth review of individual, federal and state tax updates incorporating current tax bills and legislation. His affiliation with the largest tax seminar company in the United States permits him to have access to up-to-the-minute tax developments along with resources for most tax research.

In the second session, David will examine federal and state tax planning strategies and their applications for advisors and their clients.

Health Care, Budget Reform and Family Wealth Planning

William Freedman

3:10 - 4:10 p.m.



William will explore the latest developments in health care and the budget and their effects on family wealth planning. He will examine how the latest federal agency rules and pronouncements affect the costs of employer provided health care coverage and how that will affect family wealth accumulation and preservation.

William will also discuss Congress's budget reform compromise, how the result may be a dramatically changed individual tax landscape and information on what family wealth planners should include when advising their clients. The session will conclude with options family wealth planners should consider in anticipation of Congress's possible choices.

Directions

**Miami University
Voice of America Learning Center**
7847 VOA Park Drive
West Chester, Ohio 45069
www.muohio.edu/voale

Southbound on I-75 (from Middletown or Dayton area)

Liberty Way Exit - then Left on Liberty Way, Cross I-75
Right on Cox Road, Left on VOA Park Drive

Tylersville Road Exit - then Left on Tylersville Road, Cross I-75
Left on Cox Road, Right on VOA Park Drive

Northbound on I-75 (from Cincinnati area)

Tylersville Road Exit - then Right on Tylersville Road
Left on Cox Road, Right on VOA Park Drive

Liberty Way Exit - then Right on Liberty Way
Right on Cox Road, Left on VOA Park Drive

From Hamilton Area

Route 129 (Butler Regional Highway) East toward I-75
Liberty Way Exit - just before I-75
Left on Liberty Way, Cross I-75
Right on Cox Road, Left on VOA Park Drive

CONFERENCE REGISTRATION

Seating is Limited! Register Today!

RSVP: October 5, 2011

REGISTER ONLINE AT

WWW.HAMILTONFOUNDATION.ORG

OR

Fill out the registration form below and mail or fax to:

The Hamilton Community Foundation

319 N. Third Street, Hamilton, OH 45011

Fax: 513-863-2868

Questions: Jen Schuppe, 373-6759; pac@hamiltonfoundation.org

Name _____

Organization _____

Phone _____

Email _____

Address _____

City, State, Zip _____

Profession: Insurance Agent (NPN required) Accountant

Attorney Financial Planner Trust Officer

Other: _____

I plan to attend: (Please check all that apply)

- Creative Charitable Planning Using Non-Cash Assets
- Advanced Charitable Brainteasers: A Case Study Approach
- Individual, Federal and State Tax Updates
- Federal and State Tax Planning Strategies
- Health Care, Budget Reform, and Family Wealth Planning

I plan to stay for lunch: yes no

Continuing Education Credits Pending for Accountants, Attorneys, Trust Officers, Certified Financial Planners, and Insurance Agents.

NEW: Specialized Credits for Estate Planning, Trust and Probate Law are Pending for Attorneys.

Please Note: A \$25 conference fee per person will be assessed for no-show reservations.