How does it affect you? Learn the latest on this and other issues—from New Orleans' leading estate planning experts.

NEW ORLEANS ESTATE PLANNING DAY

11th Annual

Sponsored by the New Orleans Estate Planning Council

Saturday, November 2, 2002

UNO Lakefront Campus

In cooperation with: University of New Orleans International Alumni Association, WWL-TV Channel 4, & Kinko's, Inc.

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Estate Planning Is Essential

Estate Planning Day, presented as a public service by New Orleans' top estate planners—attorneys, accountants, bank trust officers, certified financial planners, life insurance specialists and planned giving professionals—helps you:

- avoid the hazards of an unplanned estate
- understand simple steps that minimize estate complications and taxes
- learn about newest changes in estate taxes, retirement plans and other areas

Schedule

8 a.m. Registration begins

8:40 a.m. Welcome

Carole Cukell Neff
President, NOEPC

Roy A. Glapion
President, UNO International Alumni Association

Fred Siegel
Financial News Analyst, WWL-TV

Jack Rittenhouse
President-Elect
National Association of Estate Planners & Councils

9 a.m. Panel One
Getting Your Estate Plan in Order

- The Estate Planning Team
- Documenting Your Estate Plan
- Community Property & Forced Heirship

*Moderator: **Regina O. Matthews, Esq.***
Martzell & Bickford

*Panelists: **James L. Melchers, Esq.***
Melchers Law Firm

Marguerite "Peggy" Adams, Esq.
Liskow & Lewis

10 a.m. Intermission/Coffee
One-on-one time with the experts

10:15 a.m. Panel Two
Planning for Death & Taxes

- Income, Gift & Estate Taxation
- Beneficiary Designations: New Rules and Tax Planning
- 529 Plans: What Are They? How Do They Work?
- Lifetime Giving
- Using Revocable & Irrevocable Trusts

*Moderator: **Miriam W. Henry, Esq.***
Jones, Walker, Waechter, Poitevent, Carrère & Denègre

*Panelists: **Kevin P. Reed***
Trust Officer, Whitney National Bank

Kevin M. Neyrey, CPA
Ericksen, Krentel & LaPorte, L.L.P.

11:15 a.m. Intermission/Coffee
One-on-one time with the experts

11:30 a.m. Panel Three
Retirement Planning: Creating an Income to Last a Lifetime

- The Role of Insurance & Annuities
- Asset Management during Retirement and in Estate Planning
  - Social Security & Medicare
  - Long-term Care
  - Pension Benefits
  - Other Assets
- Overview: IRAs & Other Savings Tools

*Moderator: **John M. McMahon, CPA***
John M. McMahon, CPA, APAC

*Panelists: **John H. Gin, CFP***
American Express Financial Advisors, Inc.

Rory C. Roniger, CLU, ChFC
Roniger & Associates, Inc.

12:30 p.m. Lunch
One-on-one time with the experts

If you have questions of general interest to a broad audience, please include them on the registration form. Speakers, NOEPC members and other specialists are available during breaks and lunch to address questions concerning your specific situation.