

The estate tax laws have changed.
How does it affect you? Learn the
latest on this and other issues – from New
Orleans’ leading estate planning experts.

NEW 10th Annual ORLEANS ESTATE PLANNING DAY

Saturday, November 3, 2001

UNO Lakefront Campus

Presented by: The New Orleans Estate Planning Council,
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

Wayne E. Thomas
President, New Orleans
Estate Planning Council

Alfred E. “Ted” Stacey, IV
President, UNO International
Alumni Association

Fred Siegel
Financial News Analyst
WWL-TV Channel 4

**9 a.m. Basics of Estate Planning
(Panel One)**

- The Estate Planning Team
- Revocable Living Trusts
- Community Property &
Forced Heirship
- Why You Need a Will

Moderator: David H.

Bernstein, Esq.

Sessions, Fishman &
Nathan, L.L.P.

Panelists: L. Paul Hood, Jr.,

Esq.

L. Paul Hood, Jr., APLC
Deborah C. Faust, Esq.
Lemle & Kelleher, L.L.P.

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

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

- Gift & Estate Taxation
- Uses of Trusts in Estate Planning
- Charitable Giving
- Elder Law

- Living Wills
- Powers of Attorney
- Long-Term Care

Moderator: Mary C. Hester,

Esq.

Panelists: Liskow & Lewis
Robert W. Clark
Trust Officer,
Hibernia National Bank
Alfred E. Stacey, IV,
Bourgeois

CPA
Bennett, LLC

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

**11:30 a.m. Life Insurance & Retirement
Planning (Panel Three)**

- Retirement Plans & IRAs
- Use of Insurance in Estate

Planning

Moderator: Kenneth A.
McGlinchey

Weiss, Esq.
Stafford, APLLC

Panelists: Carolyn G. Stolz
CLU, ChFC, CFP
American Express

Financial Advisors, Inc.
Edward F. Martin, Esq.
Jones, Walker, Waechter,
Poitevent, Carrère &
Denègre, L.L.P.

If you have questions of a general nature or about matters of interest to the entire audience, please include your question on the advance registration form. Speakers, members of the New Orleans Estate

The New Orleans Estate Planning Council

The New Orleans Estate Planning Council is an association of estate planning professionals - Lawyers, Certified Public Accountants, Life Insurance Professionals, Bank Trust Officers, Certified Financial Planners and Planned Giving Professionals. The Council's purpose is to provide educational opportunities for both its members and the public regarding the full range of estate planning techniques. Membership education is accomplished primarily in bi-monthly membership meetings. Public education is accomplished primarily through Estate Planning Day.

The officers, who also serve as the Estate Planning Day Committee, are:

President	Wayne E. Thomas
Vice President	Carole Cukell Neff
Secretary & Chair, Estate Planning Day	John Lafargue
Treasurer	Beverly R. Nichols
Parliamentarian	Carolyn G. Stolz
Member-at-Large	Kevin M. Neyrey
Immediate Past President	Bruce Spizer

Estate Planning Day Participants Receive

- A bound 100-plus-page guide with information from New Orleans' top estate planning specialists to act as a reference.
- Two tickets may be purchased together at a discounted rate
- Lunch; coffee & soft drinks at intermissions
- Free parking in a secured area near the event conveniently located on the UNO campus.

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For more information, and links to our sponsors – www.insideneworleans.com/community/groups/estateplanning

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From I-10 or I-610, take Elysian Fields Ave. Exit (#237 from I-10 or #3 from I-610) toward Lake Pontchartrain (North) to Alumni Drive (divided street.) Turn left. University Center will be first large building on right. Follow the signs for free parking.

Name:

Address:

City/State/Zip:

Telephone:

e-mail:

Price: In advance (before Oct. 26): \$15 / \$25 for two tickets purchased together* No. of Tickets:

Thereafter: \$20 per ticket; including at the door Nov. 3. Total Enclosed: \$

(please print)

Checks Payable To:

New Orleans Estate Planning Council

P.O. Box 750357

New Orleans, LA 70175

Information:

(504) 269-5742; Fax: 895-9986

e-mail noepc@bellsouth.net

www.insideneworleans.com/community/groups/estateplanning

* Requests must be received by October 26, 2001. Please enclose a self-addressed, stamped envelope. My question of a general nature for the panelists is: (Please note – we may not be able to address all questions.)

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FORM