Corpus Christi Estate Planning Council Presents

**Forty-Sixth Annual Estate Planning Seminar**

**FEATURING**

**Of**

**Tom Hegna**

***Aaron Borden, J.D., CPA/Associate/Meadows Collier/Dallas***

***Joel Crouch, J.D./ Managing Partner/Meadows Collier/Dallas***

*With Additional Presentations By*

**Michael Gregory, NSA, MBA, ASA, CVA**

**Jason T. Mendelsohn, President Ashar Group**

**Sponsored by:**

**Coastal Bend Community Foundation**

**Wells Fargo Wealth Management Group**

**Frost Wealth Advisors**

**American Bank**

**Argent Trust**

Friday, May 3, 2019

*Solomon P Ortiz International Center ❖ 2 Harbor Drive, Corpus Christi, Texas 78401*

**DETAILED AGENDA**

|  |  |  |
| --- | --- | --- |
| 8:00 a.m. | **Registration** |  |
| 8:30 a.m. | Resolve Conflict with the IRS and Others; Negotiator, Mediator, Speaker  **–** Michael Gregory, NSA, MBA, ASA, CVA,  How to Avoid and What to do if Audited by the IRS | **One Hour** |
| 9:30 a.m. | **Break** |  |
| 9:40 a.m. | Resolve Conflict with the IRS and Others; Negotiator, Mediator, Speaker  Michael Gregory, NSA, MBA, ASA, CVA, | **One Hour** |
| 10:40 a.m. | **Break** |  |
| 10:50 a.m. | **Tom Hegna Retirement Planning and Annuities** | **One Hour** |
| 11:50 a.m. | **Lunch** |  |
| 12:50 p.m. | **Tom Hegna Social Security, Annuities and Estate Planning** | **One Hour** |
| 1:40 a.m. | **Break** |  |
| 1:50 p.m. | **Jason T. Mendelsohn, President Ashar Group fiduciaries as an**  **independent advanced planning resource in the secondary market for life insurance. Services include policy valuations, life settlements, and longevity services** | **One Hour** |
| 2:50 p.m. | **Break** |  |
| 3:00 p.m. | **Meadows Collier Estate Planning**  **No, Transfer Tax Auditing/Controversies are Not Going Away in the Era of Higher Exemptions – 1 hour**  Transfer tax audits and litigation are not going away despite higher exemptions.  The presentation will discuss current trends in the transfer tax controversy area at audit level, appeals and in litigation.  ***Joel Crouch, J.D./ Managing Partner/Meadows Collier/Dallas*** | **One Hour** |
| 4:00 p.m. | **Meadows Collier Estate Planning**  **Is it Sophisticated Estate and Tax Planning or Criminal Tax Fraud? – 1 hour**  This presentation will focus on the warning signs that distinguish legitimate planning from tax fraud.  The speaker will review recent prosecutions of CPAs and other professionals in connection with “sophisticated planning” that the government believed was fraudulent. The review of these cases will address the facts the government relied on to argue that there was no legitimate purpose for the planning and the professionals’ roles in the planning was criminal.  ***Aaron Borden, J.D., CPA/Associate/Meadows Collier/Dallas*** | **One Hour** |
| 5:00 p.m. | **Adjourn** |  |
|  | **Total Seminar Hours** | **7** |