



## JANUARY LUNCHEON PROGRAM

### “TOP TEN ESTATE PLANNING AND ESTATE TAX DEVELOPMENTS OF 2019”

TUESDAY, JANUARY 7, 2020

THE UNION LEAGUE  
140 SOUTH BROAD STREET  
PHILADELPHIA, PA 19102

11:45 – 12:00 P.M. REGISTRATION  
12:00 – 12:30 P.M. LUNCHEON  
12:30 – 1:45 P.M. PROGRAM

#### **BRING A GUEST FOR FREE TO THE JANUARY MEETING**

In an effort to introduce more estate planning professionals to our council and allow them to experience one of our high-quality luncheon programs, current PEPC members are invited to bring a NON-MEMBER guest to the January luncheon program at NO CHARGE. We encourage all members to bring a colleague who would be a potential new member of the PEPC. Please take advantage of this opportunity to add to the pool of estate planning professionals that make up PEPC's membership. When registering for the meeting through the PEPC website, you will have the option to add a guest to your registration at no charge.

This program will cover, in a countdown from ten to one, what the speaker has identified as the ten most significant developments of 2019 that affect estate planning and related tax issues. It will include discussion of both the context that makes the developments significant and the potential effects on estate planning and our professions.

**One Education Credit for CLE (PA Only), Insurance (PA Only), CFP, CPA (PA Only), PACE and CTFA will be offered.**

#### **Speaker:**

Ronald D. Aucutt is a Senior Fiduciary Counsel with Bessemer Trust Company, N.A. Before joining Bessemer in April 2019, Ron practiced law with Miller & Chevalier Chartered in Washington, D.C., for 23 years and with McGuireWoods LLP in the Washington suburb of Tysons, Virginia, for 20 years. Ron's career with those law firms focused on planning and controversy matters involving the estate, gift, and generation-skipping transfer taxes, the income taxation of trusts and estates, and the rules regarding tax-exempt organizations and charitable contributions. He advised lawyers and other professionals on tax planning and controversy issues and was experienced in resolving tax issues through rulings from the Internal Revenue Service's National Office. He contributed to the formation of tax policy through legislation and Treasury regulations. He served on the Internal Revenue Service Advisory Council in 2014 through 2016 and chaired its OPR Subgroup (working with the IRS Office of Professional Responsibility) in 2015 and 2016. In 2015 through 2018 he served as the Reporter for the Uniform Fiduciary Income and Principal Act, which was approved by the Uniform Law Commission in July 2018.

*This meeting is being sponsored by*

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The Philadelphia Estate Planning Council does not render any legal, accounting or other professional services. The Council's programs and publications are designed solely to help professionals maintain their professional competence. In dealing with specific matters, the individual using any publication obtained through the Council or any information orally conveyed by speakers at programs sponsored by the Council or in materials distributed by the Council should research original sources of authority independently.

**JANUARY 7, 2020 LUNCHEON PROGRAM  
REGISTRATION FORM**

**Luncheon Program Fee:**

PEPC Members	\$45	Non-Members	\$65
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**Additional Fees:**

CLE Credit (Members)	\$15	CLE Credit (Non-Members)	\$15
Insurance Credit (Members)	\$15	Insurance Credit (Non-Members)	\$15
CFP® Credit (Members)	\$15	CFP® Credit (Non-Members)	\$15

*\$5 additional charge for walk-in registrations at the door without pre-registration.*

**No-shows will be billed. No refunds after January 3, 2020.**

**ATTENDEE INFORMATION:**

Name: \_\_\_\_\_ Discipline: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

PEPC Member (\$45 per person)       Non-Member (\$65 per person)

Please select your lunch entrée:

French Cut Chicken Breast, Sweet Potato Puree, Kale, Apple Chicken Jus

Farfalle, Spinach, Blistered Grape Tomatoes, Locatelli

Special Dietary Needs: \_\_\_\_\_

**CONTINUING EDUCATION INFORMATION:**

(Fee: \$15 per Credit)

Continuing Legal Education (1 credit).....Attorney ID: \_\_\_\_\_

Insurance Continuing Education (1 credit).....License Number: \_\_\_\_\_

CFP® Continuing Education (1 credit).....Last 4 Digits of SSN: \_\_\_\_\_

*CTFA, PACE and CPA Credits available onsite at the meeting at no additional charge.*

**PAYMENT INFORMATION:**

Check Payment (Payable to PEPC)

Credit Card Payments – **Website Only**

PEPC is no longer accepting credit card payments via faxed or mailed registration forms. Any credit card payments must be submitted through our secure website at [www.philaepc.org](http://www.philaepc.org). **Members must be logged into the site to receive the discounted member pricing.**

**Return by Mail:** Philadelphia Estate Planning Council, P.O. Box 579, Moorestown, NJ 08057

**Return by Fax:** 856-727-9504      **Register Online:** [www.philaepc.org](http://www.philaepc.org)

**Questions:** 215-486-6215 (*Registrations will not be accepted via phone*)