



ANNUAL MEETING, SEMINAR & RECEPTION

"FEDERAL TAX UPDATE"

THURSDAY, MAY 23, 2024

THE BARNES FOUNDATION
2025 BENJAMIN FRANKLIN PARKWAY
PHILADELPHIA, PA 19130

3:15 P.M. – 3:45 P.M. REGISTRATION
3:45 P.M. – 4:00 P.M. COUNCIL REMARKS/ANNUAL MEETING/ELECTION
4:00 P.M. – 6:00 P.M. PRESENTATION
6:00 P.M. – 8:00 P.M. COCKTAIL RECEPTION

Stay up to date with this informative and entertaining recap of important cases, rulings, regulations, and legislation from the past 12 months in the federal income, estate, and gift tax laws. Specific topics to be addressed will depend on the latest developments but will likely include the estate taxation of corporate-owned life insurance, gift tax consequences of modifying grantor trusts, and the latest in foreign bank account disclosure requirements.

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

Speaker:

Samuel A. Donaldson [J.D. University of Arizona; LL.M. (Taxation) University of Florida] is a Professor of Law at Georgia State University in Atlanta, where he teaches a number of tax and estate planning courses, as well as courses in the areas of property, commercial law, and professional responsibility. Prior to joining the Georgia State faculty in 2012, he was on the faculty at the University of Washington School of Law in Seattle for 13 years, where he served as the Director of the law school's Graduate Program in Taxation as well as Associate Dean for Academic Administration. In addition to Georgia State and the University of Washington, Professor Donaldson has taught law school classes at Northwestern University, the University of Florida, and Emory University. He has won seven "professor of the year" awards from three different law schools.

He is an Academic Fellow of the American College of Trust and Estate Counsel (ACTEC) and a member of the Bar in Washington, Oregon, and Arizona. He currently serves as the Tax Editor for the *Probate Practice Reporter*, a monthly publication from the University of South Carolina School of Law. Among his scholarly works, Professor Donaldson is a co-author of the popular law school textbook, *Federal Income Tax: A Contemporary Approach*, and a co-author of the *Price on Contemporary Estate Planning* reference volume published by Wolters Kluwer.

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.

MAY 23, 2024 ANNUAL MEETING, SEMINAR & RECEPTION REGISTRATION FORM

Registration Fees:

PEPC Members: \$100

Non-Members:

\$125

Registration fee includes two-hours of programming, continuing education credits and two-hour cocktail reception with hors d'oeuvres and open bar.

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

No-shows will be billed. No refunds after May 21, 2024

ATTENDEE INFORMATION:

Name: _____ Discipline: _____

Company: _____

Address: _____

City, State, Zip: _____

Phone: _____ Email: _____

Registration Fee: ☐ PEPC Member (\$100 per person) ☐ Non-Member (\$125 per person)

CONTINUING EDUCATION INFORMATION:

(Included in Fee)

☐ Continuing Legal Education (2 credits).....Attorney ID: _____

☐ Insurance Continuing Education (2 credits).....License Number: _____

☐ CFP® Continuing Education (2 credits).....CFP Board ID: _____

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. **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

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