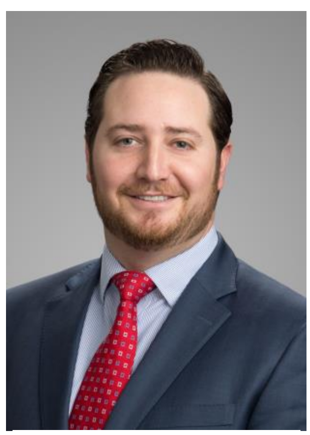
Estate Planning Council of North Texas

P. O. Box 38553, Dallas, Texas 75238-8553 Tel: 214-340-8020 E-mail: northtexasepc@yahoo.com
Website: www.epcnt.org

BREAKFAST MEETING
WEDNESDAY, SEPTEMBER 18, 2019
(Breakfast served 7:30-8:00 a.m., Program 8:00-9:00)
NOTE: MEETING LOCATION
GLENEAGLES COUNTRY CLUB (5401 West Park Blvd., Plano)
RESERVATION DEADLINE: WEDNESDAY, SEPTEMBER 11, 5:00 p.m.
(PAYMENT MUST BE IN COUNCIL'S OFFICE BY WEDNESDAY, SEPTEMBER 11)

CHARITABLE PLANNING FOR INDIVIDUALS AND TAX EXEMPT ORGANIZATION CONSIDERATIONS

BRIAN CLARK



JAMIE KATZEN

Sponsored by Frost Bank and Lee Financial

The presentation will cover two primary topics. The first, presented by Jamie Katzen, discusses the ins and outs of Charitable Gifts under Section 170 and how to use charitable trusts to further a client's estate planning goals. Jamie will explain when and how to use charitable remainder trusts, charitable lead trusts, and donor advised funds. This discussion will include the various asset protection, income tax, and transfer tax benefits of charitable planning. Second, Brian Clark will explain common formation and reporting problems with respect to tax exempt organizations, particularly those vehicles used in charitable planning. Brian will additionally provide planning advice for properly structuring a charitable joint venture, and how to mitigate excise taxes which can apply to tax exempt entities. **Jamie T. Katzen** is a tax and estate planning attorney with Gray Reed & McGraw LLP. Jamie frequently provides estate planning advice to high net worth and ultra-high net worth individuals. Additionally, he advises business owners and companies across their operational life cycle, including financing, operations, transactional tax planning, and exit strategies. Jamie received his B.A. from the University of Kansas, J.D. from St. Mary's University School of Law, and LL.M. in Taxation from SMU. **Brian A. Clark** is an associate attorney with Gray Reed & McGraw LLP. Brian frequently provides transactional tax advice with respect to the acquisition and disposition of businesses and assets. Brian also provides operational and compliance advice to tax exempt organizations. Brian received his B.B.A. from Baylor University, M.Acc. from TCU, J.D. from LSU School of Law, and LL.M. in Taxation from NYU.

Continuing education credits approved for State Bar, CPA, CFP.

Membership dues do not include meals. **Credit Cards are now accepted online at the website, www.epcnt.org**
Members who have already paid in advance for all meetings for the year **MUST** REGISTER ON THE WEBSITE (www.epcnt.org) so we will have a count for the number of meals to prepare.

THERE WLL BE 5 MEALS AVAILABLE FOR WALK-INS ON DAY OF MEETING (FIRST COME, FIRST SERVE). ALL OTHER WALK-INS WILL BE "PROGRAM ONLY". NOTE: WALK-IN PRICES ON DATE OF MEETING: Member: $30 (includes meal); Guest: $35 (includes meal); Program Only (no meal): $20

To mail a check, please complete this form, enclose a check (payable to Estate Planning Council of North Texas) and mail to: Estate Planning Council of North Texas, P. O. Box 38553, Dallas, TX 75238-8553**.**

Member: $25 (includes meal); Guest: $30 (includes meal); Program Only (no meal): $15

Name: ____ ____$25 ___$30 ____$15
E-Mail: ______________________________________
Phone Number: _________________________________

We would like to thank the following Sponsors for their support for 2019-2020: Armanino, Bank of Texas, Communities Foundation of Texas, Frost Bank, Glast Phillips & Murray, Leu & Peirce, Lee Financial Corporation, Lindquist Eisenberg LLP, North Dallas Bank & Trust, PlainsCapital Bank, Merrill Lynch (The Maynard Group), Texas Bank & Trust, The Catholic Foundation and Value, Inc.