

2012 Oregon Estate Planning Seminar

Seminar

October 25, 2012 | 3:30 p.m. - 6:30 p.m.

Garvey Schubert Barer, Portland, OR

“America is a land of taxation that was founded to avoid taxation.”

— Dr. Laurence J. Peter

In these uncertain times, it is difficult to plan anything. The potential loss of the large gift tax exemption next year has everyone talking about making gifts this year to “lock it in.”

Please join us for a discussion of the current state of the laws, possible changes on the horizon, and your options in the remaining few months of the year to take advantage of the exemption.

We will also discuss common pitfalls for executors, trustees and agents under powers of attorney (“fiduciaries”), and how to insulate them against claims from disgruntled beneficiaries. Bring your fiduciaries so they can learn how to perform their duties correctly.

Use It or Lose It – the \$5.12 Million Exemption

What is the Current State of the Estate Tax?

What to Watch Out for Now as Congress Considers the Possibilities

Your Options for Last Minute Gifts

Fiduciaries in the Crosshairs

Common Fiduciary Pitfalls

How to Insulate Your Fiduciaries from Liability

Protective Steps Your Fiduciary Should Take

Location:

Garvey Schubert Barer

Bank of America Financial Center

121 SW Morrison Street

11th Floor

Portland, OR 97204

Schedule:

3:30 - 4:00 p.m. - Registration

4:00 - 5:30 p.m. - Program

5:30 - 6:00 p.m. - Reception

Cost:

Complimentary.

Parking:

Complimentary parking. Please bring your ticket to be validated at the event.

Questions and Registration:

Contact [Kari VanKommer](#) or call (503) 228-3939 x3171