



AICPA®

ENGAGE 2019

Advanced Estate Planning

June 9–13 | Las Vegas or attend online

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360⁺
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Sessions

300⁺
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Speakers



Your goals

- Help my clients reach their life goals faster.
- Shift the emphasis of my practice from tax-only to tax plus estate planning.

Your essential sessions

Basic Estate Planning EST19101

Missia Vaselaney, JD, (inactive) CPA

Paige Goepfert, CPA | Gary Zwick, JD, LL.M. (Taxation)

Basic 706 Preparation: Common Errors EST1903

Mary Kay Foss, CPA | Donita Joseph, CPA, MBT

New Qualified Opportunity Zone (TAX, EST) ENG1915

Kelly Allen, CPA/CFF | Lisa Feathergill, CPA, PFS

Estate Planning Speed Round EST1930

Eileen Sherr, CPA, CGMA, M.T. | Mary Kay Foss, CPA

Tax Strategies for Life's Big Changes TAX1924

Jim Grimaldi, JD



Your goals

- Set and lead the competitive pace for growth.
- Hear more clients say, "I couldn't have done this without you."

Your essential sessions

Planning for the Non-Taxable Estate EST1902

Paul Lee, JD, LL.M. (Taxation)

Communicating the Estate Plan EST1905

Lisa Featherngill, CPA/PFS | Amy Jucoski, CFP

GST Tax Planning, Pitfalls & Pointers EST1915

Julie Kwon, JD

Trusts and 199A EST1912

Jere Doyle, JD, LL.M. (Taxation)

Bob Keebler, CPA/PFS, MST, AEP (Distinguished), CGMA

199A ENG1905

Bob Keebler, CPA/PFS, MST, AEP (Distinguished), CGMA



Your goals

- Set and lead the competitive pace for growth.
- Hear more clients say, "I couldn't have done this without you."
- Expand my platform as a tax and estate law expert.

Your essential sessions

Decanting EST1904

Kristen Simmons, JD | Courtney McCandless, JD
Heidi Freeman, JD

How to Move to a Zero-Tax State ENG1907

Mark Klein, JD

Planning for Clients with a \$2 million to \$22 million Estate ENG1911

Steve Siegel, LL.M. (Taxation)

You and Your Clients Best Interests PFP1922

Mitch Anthony

Practical Issues for Multi-National Planning EST1925

Peggy Ugent, CPA

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Register by May 1
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