

“ROLLING THE DICE – GIFT AND DEATH TAXES” – Rodney Retzner

1. Basics of Gift and Estate Tax – 10 min.
2. Changing Tax System – 10 min.
3. Gift and Estate Tax Proposals – 10 min.
4. Strategies for Everyone – 10 min.
5. “Tax Driven” Strategies – 10 min.
6. Advice to Various Client “Groups” – 10 min.

Tax Planning in an Uncertain Environment – Jay Utterback

1. Expected tax code changes for 2013 – 20 min
2. Implementation of Surtaxes under “Health Care Legislation” – 20 min
3. Tax planning opportunities – 20 min