



**Martin County Estate Planning Council presents its
33rd Annual Estate Planning & Tax Seminar
May 13, 2016**

- 8:15 am - 8:45 am Registration and Continental Breakfast
- 8:45 am - 8:55 am David Pittinos, President, Martin County Estate Planning Council update
- 9:00 am - 10:00 am **Karen B. Gilmore, VP**, Federal Reserve Bank of Atlanta
Federal Reserve Bank – Economic Outlook
- 10:00 am - 11:00 am **James B. Davis, Esquire**, Gunster Florida's Law Firm For Business
Drafting Advance Directives, Ethical & Economic Considerations
- 11:00 am - 12:00 pm **Jennifer Waters, Esquire**, Fox Wackeen
Prenuptial Agreements and Divorce
- 12:00 pm - 1:00 pm Lunch provided - Sponsored by **United Way of Martin County**
- 1:00 pm - 2:00 pm **Paul De Leon, CFA, Institutional Portfolio Manager**, Franklin Templeton
Overview of the Economy and the Market
- 2:00 pm - 3:00 pm **Bruce Abernethy, Jr., Esquire**, Attorney and Counselor at Law
Modern Trust Design – Back to the Basis
- 3:00 pm - 4:00 pm **Craig Dreyer, Esquire**, Dreyer Law Firm, P.L.
Estate Planning and Probate Tips and Pitfalls
- 4:00 - Social Hour



Martin County Estate Planning Council

P.O. Box 2104
Stuart, FL 34995-2104

2016 Annual Estate Planning & Tax Seminar Continuing Education Credit

JD	Approved General CLE 7 Cert. CLE – Elder Law 7 Cert. CLE – Wills, Trusts & Estates 7
CPA	Applied for
CTFA	Approved Financial Planning 7.50 Investments 3.75 Tax 2.50 1.25
CFP®	Applied for 6
CLU®	Self-report
ChFC®	Self-report
CFRE	Self-report

From: Barbara Swan [mailto:bswan@aba.com]
Sent: Tuesday, April 26, 2016 12:01 PM
To: Lones, Caryn
Subject: ICB Continuing Education Course Approval Notice

Tuesday, Apr 26 2016
Martin County Estate Planning Council, Inc.

The Institute of Certified Bankers (ICB) approved '33rd Annual Estate and Tax Planning Seminar' held on 5/13/2016 for the following continuing education credits:

<u>Designation</u>	<u>Credits</u>
CTFA	7.5
- FP:	3.75
- INV:	2.5
- TAX:	1.25

Breakdown of credit by session:

Federal Reserve Bank Structure, Policy...-CTFA INV 1.25 credits
Drafting Advance Directives, Ethical...-CTFA FP 1.25 credits
Prenuptial Agreements and Divorce-CTFA FP 1.25 credits
Overview of the Economy and the Market-CTFA INV 1.25 credits
Modern Trust Design-Back to the Basis-CTFA TAX 1.25 credits
Estate Planning and Probate Tips and Pitfalls-CTFA FP 1.25 credits

Credit approvals are based on the relevance of the program to the ICB's certification exam outline. One credit is awarded for every 50 minutes of relevant instruction.

Approval Statement

"33rd Annual Estate and Tax Planning Seminar has been approved for 7.5 CTFA credits. CTFA credits should be distributed as follows: 3.75 FP, 2.5 INV, 1.25 TAX. This statement should not be viewed as an endorsement of this program or its sponsor." ICB Members must report these credits at www.icbmembers.org.

This approval should only be used for the program, '33rd Annual Estate and Tax Planning Seminar' and is valid for one year from the date of approval. We strictly prohibit the use of ABA or ICB name and logos.

Sincerely,

Barbara Swan
Manager, Continuing Education
Institute of Certified Bankers
American Bankers Association
Building Success. Together.