



Continuing Education Program

Estate Planning 2012 Course

for Attorneys, Accountants, Financial Planners & Trust Officers

Sponsored by  BANK OF
OKLAHOMA

Friday, October 26, 2012 — 8 am – 12 noon

Catholic Pastoral Conference Center -- 7501 NW Expressway, Oklahoma City, 73132

Registration: 7:30 – 8:00 a.m. (Continental Breakfast served) Course Materials will be distributed upon arrival.

Presenter: Mr. Charles D. “Skip” Fox IV is a partner with the law firm of McGuireWoods LLC, a law firm of approximately 900 attorneys in 19 locations worldwide. He resides in Charlottesville, VA. Mr. Fox’s extensive experience includes estate planning and administration, and charitable organizations. He works with clients regarding planning for families with closely held businesses, including ownership succession issues; the use of family limited partnerships, limited liability companies, and other techniques to transfer wealth at significantly reduced transfer tax costs; and counseling on the appropriate uses of family offices. He lectures annually around the country at numerous seminars on estate planning and trust administration topics for banks, bar associations and other organizations, including the University of Miami Heckerling Estate Planning Institute and the Notre Dame Estate Planning Institute.

Session 1 Topic: Recent Developments. This will be a review of recent developments in the estate, gift, generation-skipping tax, and fiduciary income tax fields. Special attention will be paid to the marital deduction, split interest gifts, family limited partnerships and limited liability companies, valuation issues, charitable giving, and audit issues.

Session 2 Topic: Tax and Non-Tax Issues in Closely Held Business Succession Planning. One of the most difficult times for many families is the transition of a closely held business from one generation to the next. This session will look first at the non-tax issues that must be confronted in advising on the transition of a closely held business. Then, the advantages and disadvantages of various techniques such as gifts, trusts, grantor retained annuity trusts, sales to defective grantor trusts, redemptions, and Section 6166 estate tax deferrals will be examined.

Session 3 Topic: Asset Protection Planning -- Fifteen Years After Alaska and Delaware Permitted Self-Settled Asset Protection Trusts. In 1997, both Alaska and Delaware permitted settlors to obtain creditor protection through domestic asset protection trusts. This part of the program will examine different strategies for providing asset protection for settlors and beneficiaries and will pay special attention to the use of offshore trusts as well as onshore trusts that more and more states have permitted since Alaska and Delaware first opened the doors in 1997.

Session 4 Topic: The Top Ten Ethical Challenges Facing Estate Planners. This session will discuss the top ten ethical challenges facing estate planners. These challenges include representing clients in states other than the attorney's home jurisdiction, representing different members of a family, acting as a fiduciary for a client, doing work promptly, and charging reasonable fees.

Register by mail to the Catholic Foundation or online at www.cfook.org. For more information, Contact:



Catholic Foundation of Oklahoma
P.O. Box 32180, Oklahoma City, OK 73123
(405) 721-4115, mmills@archokc.org
www.cfook.org

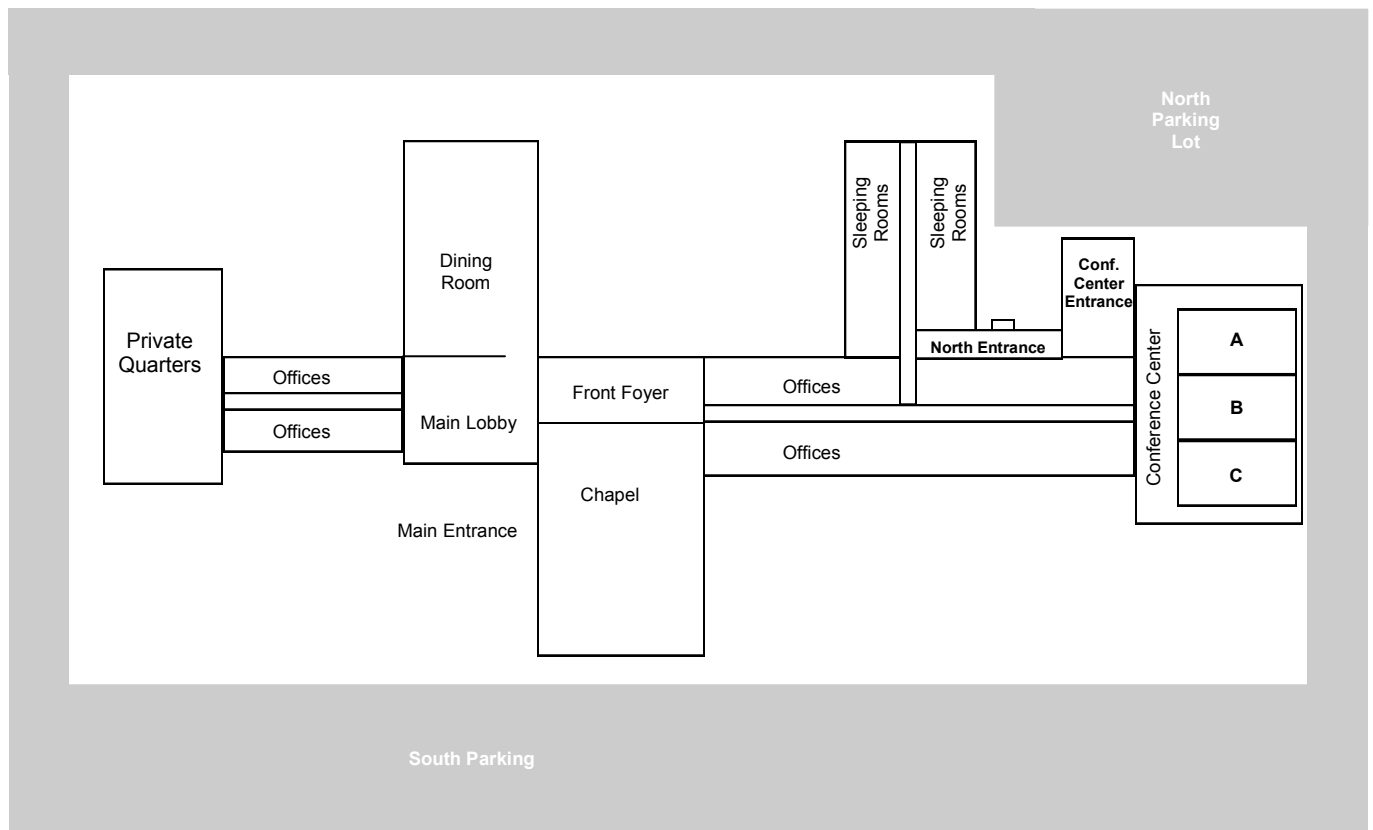
Course Registration Fee: \$50 per person in advance
\$75 per person at the door

The **Catholic Foundation of Oklahoma, Inc.** was organized as a non-profit corporation in 1965 to serve the Catholic people of Oklahoma. It was formed for the purpose of procuring and building endowment funds and to serve as a permanent organization for the management and administration of gifts given to benefit the work of the Roman Catholic Church in the state of Oklahoma. In 1980, after the Diocese of Oklahoma City and Tulsa was split into the Archdiocese of Oklahoma City and the Diocese of Tulsa, the Foundation spun off a portion of its assets so that the Catholic Foundation of Eastern Oklahoma could be formed for the benefit of the Diocese of Tulsa.

Today the Catholic Foundation of Oklahoma, Inc. serves the Catholic community in 46 counties in Central and Western Oklahoma. The Foundation is managed and directed by a Board of Directors consisting of 29 professional men and women who are selected from throughout the Archdiocese and serve without financial compensation. The primary purpose of the Foundation is to promote and to receive gifts for endowment and capital needs, to invest them wisely, and to distribute the income and/or principal from the Funds as specified by the donors.

This year, the Foundation programs include the awarding of over 75 scholarships to students throughout Central and Western Oklahoma; awarding of 37 grants to parishes and schools to assist with specific one-time needs; awarding the Educator of the Year Awards to teachers within its area; administering over 150 Funds held for Catholic parishes, schools and other organizations by investing in professionally managed "pooled" investments; assisting parishes, schools and other organizations in obtaining and securing development gifts for their operations and programming; and serving individuals by making available estate planning information. The Funds of the Catholic Foundation serve Catholic Charities, Our Lady of Guadalupe Youth Camp, St. Ann's Retirement Center, campus ministries, and many other worthy organizations throughout Central and Western Oklahoma.

As of the end of 2011 FY, the assets of the Foundation are in excess of \$46 Million. Our investment returns are competitive with other community and charitable foundations.



Catholic Pastoral Center and Conference Center

7501 N. W. Expressway, Oklahoma City, OK
 (Conference Center parking in North Parking Lot)

← Council Road.
 1/2 Mile west

Main Driveway at
 7501 N.W. Expressway

N. W. Expressway

→ Rockwell Ave.
 1/2 Mile east

Register Online at: www.cfook.org
Or call (405) 721-4115