

CARRELL BLANTON FERRIS & ASSOCIATES, PLC

Presents its

CONTINUING EDUCATION WORKSHOP FOR INVESTMENT ADVISORS, INSURANCE PROFESSIONALS, FINANCIAL PLANNERS, TRUST OFFICERS, ENROLLED AGENTS, AND CERTIFIED PUBLIC ACCOUNTANTS

The Law Firm of CARRELL BLANTON FERRIS & ASSOCIATES, PLC, is pleased to announce it will offer its highly acclaimed Continuing Education (CE) workshop on the following topic: **“From Boomer to Elder: Helping your Clients Plan and Protect their Estates.”** This three-hour workshop will be presented by the attorneys from each of the local offices of the firm. Three hours of CE Credit (Laws & Regs) will be awarded for this class. You may download the registration form by going to the firm’s website <http://carrellblanton.com> and clicking on the Seminar tab. Please select one of the following dates, time and location for this CE Workshop:

Wednesday, October 30, 2013

2:00 p.m. to 5:00 p.m.

Hosted by SFSP-Richmond

(Cocktail reception immediately following workshop)

Virginia Farm Bureau
12580 West Creek Parkway
Richmond, VA 23238

Wednesday, November 6, 2013

8:30 a.m. Continental Breakfast

9:00 a.m. to 12:00 noon

Magnuson Hotel at Oyster Point

1000 Omni Blvd.

Newport News, VA 23606

OR

Refreshments will be served

2:00 p.m. to 5:00 p.m.

Holiday Inn Virginia Beach/ Norfolk

5655 Greenwich Road

Virginia Beach, VA 23462

Course Synopsis: Even with a \$5 Million federal estate/gift tax exemption, estate planning is more important than ever. Our *Boomer* clients are looking to fund their children’s education and save for their future retirement while simultaneously addressing the needs of their aging parents. Consider this: the *elder* population -- persons 65 years or older -- numbered 39.6 million in 2009 or 12.9% of the U.S. population, about one in every eight Americans. By 2030, there will be about 72.1 million *elder* persons – almost one in every five Americans! Are you prepared to handle the financial and estate planning needs of this fast growing segment of our society? Please join us as we cover several relevant topics along this theme. The following is a brief outline of what will be presented. A question-and-answer period will follow each segment.

Topic: From Boomer to Elder: Helping your Clients Plan and Protect their Estates.

Program Facilitators:

Newport News & Virginia Beach: Richard L. Ferris, J.D., LL.M. (Taxation)

Richmond: M. Eldridge Blanton, III, J.D., LL.M. (Taxation)

A. Why Estate Planning is Still Important

Presenters: Brian R. Fraser, J.D., Kenneth A. Dodl, J.D., Thomas N. Jamerson, J.D. and Stephen M. Watson, J.D.

- | | |
|---|---|
| 1. Avoid State Inheritance/Death Taxes | 5. Provide for a Family Member with Special Needs |
| 2. Avoid the Costs, Delays, Publicity of Probate | 6. Provide for Elderly Parents |
| 3. Preserve Family Harmony in Blended Families | 7. Plan for Disability |
| 4. Protect Inheritances from Creditors, Predators and Spouses | 8. Protect a Business and Other Income-Producing Assets |
| | 9. Make Meaningful Charitable Gifts |

B. Planning for Elders

Presenters: Beth Ann Lawson, J.D. & Jeremy L. Pryor, J.D.

1. Living with Incapacity: Making Sure Your Clients Are Prepared
2. Using Special Needs Trusts: Protecting a Vulnerable Family Member

C. Planning With Retirement Plan Assets

Presenter: James W. Garrett, J.D.

1. What Makes an Inherited IRA a Good Option
2. Proper Beneficiary of an IRA especially in Blended Families
3. When to Use a Trust as Beneficiary of an IRA

The cost of this CE (three hours of Laws & Regs) Workshop is \$30, which includes workshop material and refreshments. To register, you MUST complete the enclosed registration form and FAX to **(804) 616-4306**, mail or register online **by October 25 for Richmond or November 1 for Newport News and Virginia Beach. Each location is limited to 50 participants.**

=====

Fax to **804-616-4306** or mail to: **CARRELL BLANTON FERRIS & ASSOCIATES, PLC**
7275 Glen Forest Dr., Suite 310
Richmond, VA 23226

Or register online at www.carrellblanton.com (click on Seminar tab and scroll to bottom)
 Call 804.285.7900 or 757.220.8114 for more information.

Circle Date and Time you wish to attend

October 30th - 2:00 p.m. (Farm Bureau-Richmond)–Hosted by SFSP Richmond
Cocktail reception immediately following-Please indicate if you will attend - Yes/No

November 6 – Breakfast 8:30 a.m./Class at 9:00 a.m. (Magnuson Hotel at Oyster Point-Newport News)
November 6 - 2:00 p.m. (Holiday Inn Virginia Beach)

Name: _____ Nickname: _____

Company: _____

Address: _____

Business Phone: _____ Email: _____

Virginia Insurance License Number/ National Producer Number: _____

CFP® License Number: _____ CPA _____

Please make checks (\$30) payable to: **CARRELL BLANTON FERRIS & ASSOCIATES, PLC**