

**BUCKS COUNTY ESTATE PLANNING COUNCIL**

P.O. Box 67, Doylestown, PA 18901

[www.buckscountyepc.org](http://www.buckscountyepc.org)

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**DINNER MEETING NOTICE**

**Tuesday - October 18, 2011**

**To: Members of the Bucks County Estate Planning Council**

**Topic: Gifting on the Clock – 15 Months and Counting**

**Speaker: Jerome Deener, *Fox Rothschild***

**Time: 5:30pm: Cash Bar**  
**6:15pm: Dinner**  
**7:00pm: Speaker Presentation**

**Location: Doylestown Country Club**  
**20 Country Club Drive, Doylestown, PA 18901**

The tax law passed at the end of 2010 provided that for 2011 and 2012, the estate, gift and generation skipping tax exemptions are all \$5M. There are a number of planning options for clients to consider during this time period, which is now almost half way over. The law also introduced the concept of portability of the exemption between spouses, which raises the issue of whether credit shelter trusts are still necessary for protecting the exemption of the first spouse to die. Jerome Deener, a nationally recognized estate planning attorney and tax litigator, will discuss these issues and the opportunities presented.

Please distribute a copy of this notice to your colleagues. The entrée for this meeting will be Stuffed Flounder. A vegetarian meal is being offered if this does not meet your dietary needs. Please indicate your choice below.

If you have any questions please contact Yvette E. Taylor-Hachoose, ([yvette@taylorhachoose.com](mailto:yvette@taylorhachoose.com)). This meeting will qualify for CPE & CLE.

Name: \_\_\_\_\_

Guest(s) \_\_\_\_\_

Phone number: \_\_\_\_\_ Number of attendees \_\_\_\_\_

Amount enclosed @ \$35 each per member (\$40 @ door) \$ \_\_\_\_\_

Amount enclosed @ \$45 each per non-member \$ \_\_\_\_\_

Fee for CLE credits (\$5) \$ \_\_\_\_\_

Total (make check payable to BCEPC) \$ \_\_\_\_\_

\_\_\_\_\_ Please order the Stuffed Flounder for me.

\_\_\_\_\_ Please order the vegetarian meal for me.

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