

THE FINANCIAL AND ESTATE PLANNING COUNCIL OF METROPOLITAN DETROIT

presents

# SAMUEL A. DONALDSON, JD

**TUESDAY, NOVEMBER 10, 2015**  
**FEPCCMD ANNUAL MEETING – ELECTION OF OFFICERS**  
**Imagine Theatre**  
**200 Main Street, Royal Oak, MI 48067**

**2 Hours CE and CFP credit for afternoon session: State of Michigan Life and CFP**

**AFTERNOON PROGRAM / AUDITORIUM #10:**

**Registration: 3:00 p.m.**

**Presentation: 3:15 p.m. – 5:30 p.m.**

**Break: 4:15 p.m. – 4:30 p.m. (cookies and beverages)**

**“Federal Tax Update” Life #67790 / CFP #216453**

**COST: \$90.00**

**COST: \$25.00 (CFP Discount for Those Who Completed the Oakland CFP course in the last 12 months)**

**EVENING PROGRAM:**

**Complimentary Cocktails: 5:30 p.m. – 6:30 p.m.**  
**High Roller Room**

**Presentation: 6:30 p.m. – 7:30 p.m.**

**Skybox Lounge**

**Dinner: 7:30 p.m.**

**“Hot Income Tax Tips For Estate Planners”**

**COST: \$60.00**

**FULL DAY DISCOUNT: \$125.00**

**SAMUEL A. DONALDSON** [J.D. University of Arizona; LL.M. (Taxation) University of Florida] is a Professor of Law at Georgia State University in Atlanta, Georgia. Prior to joining the Georgia State faculty in 2012, he was on the faculty at the University of Washington School of Law for 13 years. During his tenure at the University of Washington, he was a five-time recipient of the Philip A. Trautman Professor of the Year award from the School of Law’s Student Bar Association. Professor Donaldson served for two years as Associate Dean for Academic Administration and for six years as the Director of the law school’s Graduate Program in Taxation. He teaches a number of tax and estate planning courses, as well as courses in the areas of property, commercial law and professional responsibility. Professor Donaldson is an Academic Fellow of the American College of Trust and Estate Counsel (ACTEC) and a member of the Bar in Washington, Oregon, and Arizona. Among his scholarly works, he is a co-author of the West casebook, *Federal Income Tax: A Contemporary Approach*, and a co-author of the *Price on Contemporary Estate Planning* treatise published by CCH. Professor Donaldson has served as the Harry R. Horrow Visiting Professor of International Law at Northwestern University and a Visiting Assistant Professor at the University of Florida Levin College of Law. An amateur crossword constructor, his puzzles have been published in *The New York Times*, *The Los Angeles Times*, *The Washington Post*, *The Chronicle of Higher Education*, and other outlets.

**AFTERNOON PRESENTATION:** Focusing on recent developments in federal income, gift, and estate taxes of interest to estate planners, this session will cover fundamental and advanced tax strategies for affluent clients by recapping important cases, rulings, regulations, and legislation from the past 12 months and discussing how those developments impact the new planning paradigms applicable in advising high net worth individuals. Specific topics include the application of the net investment income surcharge to trusts managing rental property, new perils in the transfer of closely-held business interests, and strategies for insuring a complete step-up in basis on the death of a surviving spouse.

**EVENING PRESENTATION:** For most clients, federal wealth transfer taxes are irrelevant. Now federal income tax planning is the central component of modern estate plans. This session will highlight important income tax planning strategies that all estate planning professionals should know.

Log onto our website by October 30 to make your reservation and pay with VISA or Master Card. [www.metrodetroitfepc.org](http://www.metrodetroitfepc.org)

OR PLEASE MAIL YOUR RESERVATION AND CHECK BY OCTOBER 30 TO:

FEPCCMD • c/o Association Expertise • 33006 W. Seven Mile Road, #237 • Livonia, MI 48152 - PLEASE NOTE CHANGE OF ADDRESS  
Phone: (248) 538-7654 • Fax: (248) 479-0350 • [fepccmd@associationoffice.org](mailto:fepccmd@associationoffice.org) – PLEASE NOTE CHANGE OF PHONE & FAX

Member Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Guest Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Full Day \_\_\_\_\_ Afternoon Program Only \_\_\_\_\_ Evening Program Only \_\_\_\_\_

Amount Enclosed \_\_\_\_\_ Dietary Restriction Request \_\_\_\_\_