



The Financial and Estate Planning Council of Metropolitan Detroit, Inc.

April 2015

30600 Northwestern Hwy., Suite 208, Farmington Hills, MI 48334 • (248) 538-7654 • FAX: (248) 671-0165

President's Message

As I write the Presidents' Message column from an airplane approaching Detroit Metro Airport, I can see pockets of green on the ground, so that must mean that spring is drawing near at long last.

Being the dad of a three year old girl (and an 18 and 21 year old as well), I am sympathetic to those younger members of our council - or old members like me who happen to have young kids -who struggle to participate in our four annual events scheduled around the dinner hour. In response to this feedback from our members and in order to promote new membership into our organization, we are going to kick off a new "lunch and learn" series this year that will focus on a technical topic and allow for some networking as well. Our first event is scheduled for **April 30th** and will run from 11:30 to 12:30. Please watch for an upcoming announcement that will have all of the details. I encourage you to attend or at a minimum, send one of your younger associates to the event to enhance his or her professional and personal development. (A big thank you to Jeffrey Hoenle and his committee for pushing this forward!)

Also mark your calendar for Monday, **May 18th**, which is the date of our 9th Annual Golf & Tennis Charity Event and our Member Meeting and dinner, which will be held at Wabek Country Club. Net proceeds raised from the event will benefit Detroit Public Television ("DPT") and more specifically, the Detroit Educational Television Foundation. Dan Alpert, a senior vice president and icon at DPT, will give a multi-media presentation at our dinner regarding DPT, its history and what it is working on today to continue its mission of promoting the value of public television and its partnership with the community. (A special thank you to Brad Kreiner and Bernie Kent and their golf and tennis committees, respectively, for making this event happen!)

There are a lot of other exciting events planned for the

second half of the year. First, given the great things happening in the City of Detroit, we are going to partner with an organization called the Detroit Experience Factory (www.weknowdetroit.com) for our Spouse's night event on **September 9th**. In addition to our traditional cocktail hour and dinner, there will be a bus tour that will be making various stops at entertaining and historic locations in Detroit that many of you would be surprised to see if you haven't ventured out recently.

Our last event is scheduled for November 10th in Royal Oak at Emagine Entertainment & Star Lanes; we have a nationally renowned speaker lined up - Sam Donaldson from the Georgia State University College of Law- who will give a two hour CE session in the afternoon titled "Federal Tax Update" and a presentation at dinner on "Hot Income Tax Tips for Estate Planners."

In planning our meetings for this year, the Board had a goal of organizing events and speakers that were engaging, educational, and unique. We look forward to seeing you at the remaining events this year and as always, welcome any feedback you may have.

Jeff Risius, President 🏛️

WELCOME TO OUR NEW MEMBERS

LORI CROSE

Oakland University

Sponsors: Jeff Hoenle and Eric Carver

NICOLE GOPOIAN

Planning Alternatives

Sponsors: Marilyn Dimitroff and John Burpee

NICOLE R. MOTEN

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FINANCIAL AND ESTATE PLANNING COUNCIL OF METROPOLITAN DETROIT

MEMBER MEETING PRECEDED BY THE 9th ANNUAL GOLF & TENNIS OUTING
(Please refer to the additional Golf & Tennis Outing Notice)

MONDAY, MAY 18, 2015

Wabeek Country Club
4000 Clubgate Drive, Bloomfield Hills, MI 48302

Dan Alpert, Senior Vice President
Representing Detroit Public Television

“Today’s Detroit Public Television – Trusted Nationally; Connected Locally”

Presentation Highlights: Historical perspective about the creation and values of public television, mission of partnership with the community, and updates on productions and projects that continue the mission

Dan Alpert is Senior Vice President of Philanthropy for Detroit Public Television, WTVS Channel 56. Dan has worked for DPTV in several position over the 38 years, helping make the station a PBS leader in viewership, fund-raising, technical facilities and business opportunities. Dan has many accomplishments in the fundraising arena, received a national award for government relations, is a recognized industry spokesperson for public television and twice served as acting or interim general manager.

Dan has served in Detroit on the boards of the Karmanos Cancer Institute, Michigan Association of Public Broadcasters, the Friends of the Detroit School of Arts, and the National Television Academy (Michigan), which presented him the Silver Circle Award in 2000 for 25 years of industry and community service.

Originally from Chicago, Dan is a 1973 graduate of Michigan State University’s James Madison College for economic policy making, with all the additional credits for a Telecommunications major. After college, Dan worked for WKAR-TV East Lansing and before that in radio during college in the Lansing area, as a reporter, writer, producer, and on-air talent, and for Radio Free Europe in New York as a general assignment reporter.

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AGENDA: 5:30 p.m. Complimentary Cocktails
 6:30 p.m. Presentation
 7:30 p.m. Dinner

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**Log onto our website by May 11, 2015 to make your reservation and pay with VISA or Master Card.**  
[www.metrodetroitfepc.org](http://www.metrodetroitfepc.org)

**RESERVATIONS RECEIVED AFTER MAY 11 WILL COST \$85.00 PER PERSON.**

OR PLEASE MAIL YOUR RESERVATION AND CHECK **BY MAY 11, 2015 TO:**                      **COST: \$60.00 PER PERSON**  
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MEMBER NAME: \_\_\_\_\_ GUEST NAME: \_\_\_\_\_  
TOTAL ENCLOSED: \_\_\_\_\_ SPECIAL MEAL REQUESTS: \_\_\_\_\_

# FINANCIAL AND ESTATE PLANNING COUNCIL OF METROPOLITAN DETROIT 9th ANNUAL CHARITY GOLF/TENNIS OUTING



Net Proceeds and Additional Contributions to  
Benefit Detroit Educational Television Foundation



## MONDAY, MAY 18, 2015

### Golf:

**Wabeek Country Club**  
4000 Clubgate Drive,  
Bloomfield Hills, MI 48302  
<http://www.wabeekcc.org/>  
(248) 855-0700

### Tennis:

**Detroit Tennis and Squash Club**  
31031 Drake Road  
Farmington Hills, MI 48331  
<http://www.detroittennis.com/>  
(248) 661-2300

11:15 AM REGISTRATION / 11:45 AM: BOX LUNCH/  
SHOTGUN START 12:00 PM

18 HOLES OF GOLF WITH A CART/DRIVING RANGE  
WARM-UP/UNLIMITED COURSE BEVERAGES

4-PERSON SCRAMBLE (INCLUDES DINNER)  
\$150 PER GOLFER  
(SINGLE GOLFERS ARE WELCOME)

\$600 PER FOURSOME

\$700 FOR A FOURSOME AND A HOLE SPONSOR

\$150 HOLE SPONSOR ONLY

\$100 TENNIS AND DINNER  
(includes court time and beverages)  
Showers and Lockers Available

1:00 PM Warm Up

2:00PM Round Robin Doubles Tournament  
(individual sign up - no teams)

5:30 PM COCKTAILS  
6:30 PM MEETING & GUEST  
SPEAKER  
7:30 PM DINNER  
(\$60.00 COCKTAILS & DINNER ONLY)

Log onto our website by May 11 to make your reservation and pay with VISA or Master Card. [www.metrodetroitfepc.org](http://www.metrodetroitfepc.org)  
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#### Golf Registration:

GROUP NAME: \_\_\_\_\_ GROUP CONTACT INFO: \_\_\_\_\_

PLAYER #1 \_\_\_\_\_  
PLAYER #2 \_\_\_\_\_  
PLAYER #3 \_\_\_\_\_  
PLAYER #4 \_\_\_\_\_

YES I WANT TO SPONSOR A HOLE       PAYMENT ENCLOSED: \_\_\_\_\_



#### Tennis Registration:

Name: \_\_\_\_\_ Contact Info: \_\_\_\_\_

PAYMENT ENCLOSED: \_\_\_\_\_



## The Robert G. Alexander Webinar Series Offered by NAEPC

Wednesday, April 22, 2015 3:00pm - 4:00pm

### Decanting an Irrevocable Trust: The Ultimate Do-Over

**Steven J. Oshins, JD, AEP® (Distinguished)**

Decanting allows the terms of an irrevocable trust to be changed by distributing the trust assets to a different trust with different terms. This has become a popular technique because there are so many people who want to change the the terms of their irrevocable trusts.

Steven J. Oshins, Esq., AEP® (Distinguished) is a member of the Law Offices of Oshins & Associates, LLC in Las Vegas, Nevada. He is listed in *The Best Lawyers in America*® and was named the Las Vegas Trusts and Estates Lawyer of the Year in 2012 and 2015 by *The Best Lawyers in America*®. He was inducted into the NAEPC Estate Planning Hall of Fame® in 2011.

**REGISTER AT: <https://secure.confertel.net/tsregister.asp?course=584233>**

#### Registration Fees

- \$40 / Accredited Estate Planner® designee (dues must be current at the time of registration)
- \$60 / member of an affiliated local estate planning council or at-large member of NAEPC

## FEPCMD Spouses' Event

Wednesday, September 9, 2015

### The Detroit Experience Factory Tour & Member Meeting at the Majestic Theatre

Please stay tuned for complete details

## FEPCMD CE Afternoon & Annual Meeting

Tuesday, November 10, 2015

### Samuel Donaldson, JD

|                    |                                                                                        |
|--------------------|----------------------------------------------------------------------------------------|
| 3:30 pm to 5:30 pm | CE Presentation – “Federal Tax Update” Two Hours of CE pending                         |
| 5:30 pm to 6:30 pm | Cocktails                                                                              |
| 6:30 pm to 7:30 pm | Annual Meeting and 30 Minute Presentation<br>“Hot Income Tax Tips for Estate Planners” |
| 7:30 pm            | Dinner                                                                                 |



OF MICHIGAN



Professional and Continuing Education

Present

# “A Working Lunch on Entering the Real Estate Rental Market” THURSDAY, APRIL 30, 2015

**PASQUALE’S RESTAURANT**  
**Mediterranean Room**  
**3155 Woodward Avenue, Royal Oak, MI 48073**  
**(Near 12 Mile Road)**

## PANEL DISCUSSION:

**CPA** – Property and income tax considerations

**Attorney** – Legal and titling issues as well as the benefits and responsibilities of using an LLC

**Insurance** – Correct policy forms and coverage’s that should be used

**Financial Planner** – Potential income opportunities along with the methods used to calculate return

### Topic and Event Overview:

- *In the past many people in the residential real estate rental business were professional landlords and entered this arena as part of a well thought out business model. With the real estate bubble burst of 2008, many new landlords entered the rental business without any experience and with limited guidance. For some, they assumed it seemed like a smart plan to avoid capturing market losses in their property and deferring the sale of a residence until the market returned to normal. Many of these new landlords were unaware that their decision could be broad reaching. Today, professionals serving their clients still occasionally hear from clients that they may consider this route and more than likely already have clients engaged in this arena.*
- *It is important to recognize that this decision has numerous considerations in many of the professional disciplines. The purpose of this round table discussion is to shed some light on these considerations so if a client brings up this idea, attendees will have a strong understanding of the questions and potential problems that could face owners of rental real estate.*
- *The discussion panelists will be available during the lunch to answer questions.*

**AGENDA:** 11:30 a.m.  
11:45 a.m. – 12:30 p.m.

**Registration**  
**Buffet Dining & Presentation**

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Log onto our website by April 24 to make your reservation and pay with VISA or Master Card.

www.metrodetroitfepc.org

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COST: \$10.00 PER PERSON

MEMBER NAME: _____ COMPANY NAME: _____

GUEST NAME: _____ TOTAL ENCLOSED: _____

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