

THE FINANCIAL AND ESTATE PLANNING COUNCIL OF METROPOLITAN DETROIT

presents

MICHAEL W. HALLORAN

TUESDAY, NOVEMBER 1, 2011

FEPCCMD ANNUAL MEETING – ELECTION OF OFFICERS

The Gem Theatre

333 Madison Street, Detroit, MI 48226

sponsored by:



Approved CE credit for afternoon session: State of Michigan Life (#57798) and CFP (#11111)

AFTERNOON PROGRAM:

Registration: 3:00 p.m.
Presentation: 3:30 p.m. – 5:30 p.m.
Break: 4:30 p.m. – 4:45 p.m. (cookies and beverages)

“Beneficiary Defective Inheritor’s Trust”

COST: \$75.00

EVENING PROGRAM:

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

“Charitable Remainder Trust”

COST: \$60.00

FULL DAY DISCOUNT: \$110.00

Michael W. Halloran, CLU, ChFC, CFP®, AEP®, LUTCF, RHU, REBC, is a Wealth Management Advisor with the Northwestern Mutual Financial Network. In addition, Mike is an Estate Strategies Group Advisor (ESG) and also part of the Estate Business Planning Specialist Study Group (EBPS). Mr. Halloran has published many articles and columns during his career. His most recent article appeared in the New York University Review of Employee Benefits and Executive Compensation, October 2009 entitled “The Cash Value Beneficiary Defective Inheritor’s Trust (The ‘Cash Value BDIT’): Creating a More Flexible and Comprehensive Wealth Accumulation and Retirement Plan”. In addition, Mr. Halloran wrote an article in the December 10, 2007 issue of National Underwriters titled “For Large Estates, Consider Grantor Retained Annuity Trusts”. This article explained the use of GRATs as an aid in paying off a financed insurance loan for Estate Planning purposes. Other articles include the February 2007 issue of Money Magazine which gave specific detail on protection needs for a high profile television character. Mr. Halloran has a passion for public speaking and has been on several speaking tours. Mike has spoken to the graduating Medical School students at Louisiana State University. He has spoken to Residents and Fellows at Mayo Clinic and the University of Florida as well as many other universities.

AFTERNOON PRESENTATION: Michael Halloran will discuss primary high end wealth shifting strategies, the BDIT concept, modern wealth designs that enhance the value of gifts and bequests, enhanced IDITs for estate depletion planning, the funded ILIT, life insurance correlation with the BDIT, providing funds for retirement, life insurance as an asset class, planning for pass-through entities, buy-sell strategies, advanced asset protection strategies, income tax strategies, estate planning for professional athletes and entertainers, and other planning opportunities.

EVENING PRESENTATION: Michael Halloran will discuss mechanics of a CRT, advantages, tax consequences, taxation on income distributions, gift tax, estate tax, common features, payouts, remainder interest rules, and wealth replacement ideas.

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

www.metrodetroitfepc.org

OR PLEASE MAIL YOUR RESERVATION AND CHECK BY OCTOBER 24 TO:

FEPCCMD • 30600 Northwestern Hwy-#208 • Farmington Hills, MI 48334

Phone: (248) 538-7654 • Fax: (248) 538-7656

Member Name: _____ Phone Number: _____

Guest Name: _____ Phone Number: _____

Full Day _____ Afternoon Program Only _____ Evening Program Only _____

Amount Enclosed: _____