

THE FINANCIAL AND ESTATE PLANNING COUNCIL OF METROPOLITAN DETROIT
presents

Anita M. Sarafa, J.P. Morgan Private Bank
David A. Diamond, Gordon, Fournaris & Mammarella, P.A.

TUESDAY, SEPTEMBER 18, 2012

THE DETROIT YACHT CLUB
1 Riverbank Road
Detroit, Michigan 48207 [MAP](#)

Sponsored By



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CE credit for afternoon session: State of Michigan Life (No. 60239) and CFP (No. 91812) / Two (2) Hours

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)

**“Directed Trusts, Decanting and Asset
Protection: A Potpourri of Planning
Opportunities in Delaware”**

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.

**“Achieving the Promise of
Multi-Participant Trusts”**

COST: \$60.00

FULL DAY DISCOUNT: \$110.00

Anita M. Sarafa, a Managing Director with the J.P. Morgan Private Bank, advises clients across the Midwest region on their comprehensive estate planning needs and goals. Anita currently serves as President of the Chicago Estate Planning Council. She speaks and writes nationally on topics related to multi-state estate planning and charitable giving and tax planning and has been featured in The New York Times.

David A. Diamond joined the Wilmington law firm of Gordon, Fournaris & Mammarella, P.A. in March 2012. His practice focuses on the unique aspects of Delaware law, including directed trusts, dynasty trusts, and asset protection trusts. Prior to joining Gordon, Fournaris & Mammarella, David was a Managing Director and President of J.P. Morgan Trust Company of Delaware. He has over twenty-five years of trusts and estates experience in planning, structuring, and administration, and brings this experience to his law practice as he is advising individuals and corporate trustees.

AFTERNOON PRESENTATION: Anita Sarafa and David Diamond will discuss current developments in Delaware law, the use of investment advisors and other discretionary advisors through directed trusts in Delaware, a comparison of Delaware and Michigan directed trusts, creating Delaware nexus, the benefits of Delaware asset protection trusts, using Delaware to “decant” trust assets to one or more new trusts designed to meet changing needs and circumstances, and much more!

EVENING PRESENTATION: Anita Sarafa will discuss the trend toward multi-participant trusts. She will identify the various trust participants in modern trusts from administrative trustees and trust advisors to protectors. She will also identify the “coordination gap” among multiple trust participants, problems with multiple trust participants, effects of state law on the functioning of multi-participant trusts and provide guidance in creating a well functioning multi-participant trust. In addition, David Diamond will add updates on Delaware law, legislation and moving trusts to Delaware

Log onto our website by September 11 to make your reservation and pay with VISA or Master Card.

www.metrodetroitfepc.org

OR PLEASE MAIL YOUR RESERVATION AND CHECK BY SEPTEMBER 11 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: _____