



Multnomah Bar Association

Wednesday, April 16, 2014 3:00 – 5:00 p.m.

White Stag Building Wayne Morse Suite 70 NW Couch St, Portland

Registration forms with payment must be received by the MBA office by April 15 or the "at the door" registration fee will apply.

This seminar will be worth two hours of OSB MCLE credit. Two Washington MCLE credit can be obtained individually. Registrants who miss the seminar may request the handout materials. Sorry, no refunds. Substitutions are welcome; non-members may be subject to an additional fee. Accommodations available for persons with disabilities; please call in advance for arrangements.

Tax Planning for the Taxable Estate

Note: This class is co-sponsored by UO Law and will be held at the White Stag Building in the Wayne Morse Suite, 70 NW Couch St, Portland

The CLE will detail how to assess a client's exposure to Federal Estate and Oregon Inheritance Tax regimes, as well as the client's exposure to gift, GST and other transfer taxes. There will also be a presentation on income tax planning for clients whose estates are not subject to transfer taxes, and a corresponding see-through trust form. John Christianson, Gevurtz Menashe, Helen Pruitt, Wyse Kadish and J. Mack Shively, Attorney at Law will lead a discussion on common planning techniques, such as the use of different trusts to create tax efficient plans.

For more information: Call Will Glasson, University of Oregon School of Law at 503.412.0468. For registration questions, call the MBA at 503.222.3275.

Name _____
Firm _____
Billing Address _____
Phone _____ OSB # _____

Register me for the seminar as indicated:

- MBA Member \$55.00
MBA Member at the door \$60.00
Non-MBA Member \$85.00
Non-MBA Member at the door \$90.00

I will not be attending but would like to order:

- CD ROM / & Handouts (Member) \$55.00
CD ROM / & Handouts (Non-Member) \$85.00

Send form and payment to: Multnomah Bar Association

620 SW 5th Ave Ste 1220 Portland OR 97204 Fax 503.243.1881 (for credit cards only) Ph 503.222.3275

Payment Options:

- Check (enclosed) or Visa MasterCard American Express

Acct # _____

Exp. Date _____ Security Code _____

Signature _____