

Wilcox Law Firm

"Providing exceptional estate planning services for exceptional clients"®

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January 13, 2011

Dear Friends and Fellow Advisors:

All-day Seminar for Advisors

Enclosed, please find an agenda for the all-day Continuing Legal/Professional Education Seminar our firm is hosting on February 24, 2011. This seminar will cover changes in the new tax laws, as well as estate planning concepts from the basic to the more complex.

You are invited to attend any one or more of the sessions during this day-long seminar. Also, please keep in mind that the morning sessions will focus on basic estate planning concepts, while the afternoon sessions will focus on technical and complex topics.

Professional credit for CPAs, attorneys, and financial advisors is being applied for, but has not yet been approved.

Two One-hour Seminars for the Public

In addition to the all-day seminar, our firm is hosting two identical one-hour tax law seminars on February 23, 2011, which will be free and open to the public. These seminars will cover important changes in the tax laws as a result of Congress' passage of the Tax Relief, Unemployment Insurance Reauthorization, and Job Creation Act of 2010.

Both of these seminars will be held at the New Mexico State Bar Complex, located at 5121 Masthead, N.E., Albuquerque, New Mexico 87109. There will be two sessions, one at 9:30 a.m. and one at 5:30 p.m.

We have enclosed invitations to these free seminars, which we encourage you to distribute to your clients, colleagues, and the general public, or to any person you know who might be interested in attending.

We encourage you to RSVP if you and/or your guests would like to attend either the short public seminar, or the all-day seminar for professionals, as *seating will be limited*.

Please feel free to contact us with questions. Thank you.

Sincerely,



Vickie R. Wilcox, J.D., LL.M. (Taxation)
Certified Estate Planning, Trust, and
Probate Law Specialist

VRW:gms
Enclosures

Estate Planning Overview from the Simple to the Complex (from Probate to Generation Skipping Transfer Tax)

02/24/11
8:00 a.m. – 5:00 p.m.
New Mexico State Bar Complex
5121 Masthead NE
Albuquerque, New Mexico 87109

There is no fee for this seminar. However, making a charitable donation of \$75 to a charity of your choice is encouraged. Please consider donating to:

The University of New Mexico Foundation, The Albuquerque Community Foundation, Animal Humane Association of New Mexico, Albuquerque Little Theater, Alzheimer's Association, National Senior Citizen's Law Center, Equal Access to Justice, or a Religious Organization of Your Choice.

Seating is limited, so you must RSVP to attend.

Type of meeting: Continuing Legal/Professional Education

Agenda

Sign-in		8:00 – 8:30 a.m.
Overview of the Tax Relief, Unemployment Insurance Reauthorization, and Job Creation Act of 2010	Vickie R. Wilcox and Cynthia S. Sikelianos	8:30 – 9:30 a.m.
Probate: The Basic Process (How and Why to Avoid it, if Possible)	Patricia M. Galindo	9:30 – 10:00 a.m.
Break		10:00 – 10:15 a.m.
Revocable Living Trusts and Ancillary Documents: The "Basic Estate Plan"	Vickie R. Wilcox and Gregory M. Segura	10:15 – 11:15 a.m.
Funding Trusts: How to Properly Title Assets, Including Qualified Retirement Account Beneficiary Designations	Jamie M. Lewinger and Cynthia S. Sikelianos	11:15 a.m. – 12:00 p.m.
Lunch (Please make your own lunch plans)		12:00 – 1:00 p.m.
Guardianships/Conservatorships: Update on New Mexico Cases	Patricia M. Galindo	1:00 – 2:00 p.m.
Irrevocable Life Insurance Trusts (ILITs): Why Insurance Continues to be a Critical Tool in Estate Planning	Cynthia S. Sikelianos	2:00 – 3:00 p.m.
Break		3:00 – 3:15 p.m.
Wealth Transfer Techniques in the Current Environment: How to Take Advantage of Low Interest Rates and High Transfer Tax Credit	Vickie R. Wilcox	3:15 – 4:15 p.m.
Planning for the Generation Skipping Transfer Tax: Maximize Wealth Transfers and Asset Protection Through the Generations	Vickie R. Wilcox	4:15 – 5:00 p.m.

Presented By:

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Please RSVP to:

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