

Presenters

Julianne E. Steinbacher, Esquire—Julie Steinbacher, Steinbacher & Stahl, is the founding shareholder of this elder law and special needs planning firm. She is the president of Estate & Long Term care Planning, Inc., a company that provides continuing education for professionals and coaching for attorneys throughout the nation. Julie lectures extensively at state and national conferences related to elder law, special needs planning, and tax issues. Julie has written materials that have been published by the University of Illinois on estates, trusts, and taxation. She has co-authored the Pennsylvania Trust Guide, and the Pennsylvania Special Needs Planning Guide, each published by George T. Bisel, Inc.

Samantha Wolfe, Esquire, LLM—Samantha, of Steinbacher & Stahl, graduated in 2004 from Penn State University with a B.A. in journalism and a minor in nutrition. In 2008, she earned her juris doctor from Regent University School of Law. While attending law school she was a managing editor for the Regent Journal of International Law and a student volunteer for the Volunteer Income Tax Assistance Program. After graduating from law school she attended Southern Methodist University Dedman School of Law and earned her LL.M. in taxation. Samantha's area of concentration at Steinbacher & Stahl is federal gift and estate tax planning and wealth protection planning. She is a member of the Pennsylvania Bar Association and the Lycoming Law Association.

John & Matt Williams—TaxProSites.com is owned and operated by MWS / PENNHOST.com, a well established Computer and Web Hosting company located in Northeastern PA (est. 1977). Their company hosts customers from across the country on the latest high speed servers. They have Tier 1 bandwidth providers, SBC and Allegiance, built on a Cisco powered network and guarantee 99.9% uptime. MWS / PennHost.com has been providing web design and hosting for the past 10 years. They offer Domain Name Registrations at competitive discount prices in "real time" on our website. Solid experience has combined with the "Taxpro Seminar" team to bring you the best web site for your business. They also offer a complete suite of services such as: Logo Design, Site Customization, Payroll Services (branded for your firm), and File Transfers (for clients bookkeeping).

Bob Hager—Lindsey & Hager—Bob has a BS from Bloomsburg State University and has held his CPA license since 1985; additionally, he is a member of AICPA and PICPA. Bob began his accounting career in 1981 as an IRS Field Agent for the US Treasury Department. He has been in private practice since leaving the IRS in 1986 and is a managing partner at Lindsay & Hager, PC. His practice is concentrated in the taxation of estates, corporations, partnerships, and individuals. Bob has presented numerous tax seminars throughout Pennsylvania and has also been an author and editor for the University of Illinois.

**Estate & Long Term
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Estate & Long Term Care Planning

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December 20, 2011
8:00 am – 5:00 pm

The Holiday Inn
100 Pine Street
Williamsport, PA

Agenda

7:45 – 8:15 Registration, Breakfast, and Welcome. “Rise & Shine” breakfast including eggs, breakfast meats, potatoes and pastries, with hot and cold beverages.

8:15 – 9:30 The Top 7 Things Every Tax Preparer Needs to Know About Estate & Long Term Care Planning—Julie Steinbacher

9:30 – 9:45 Break and networking

9:45 – 11:00 What’s In Your Closet: A Look at Trusts & Taxation—Samantha Wolfe, Esq., LLM

11:00 – 11:45 Protecting Client Confidences: Technology and Your Business— John or Matt Williams

11:45 – 1:00 Lunch (On Your Own)

1:00 – 2:30 Navigating the Complexities of a Business Succession Plan— Samantha Wolfe, Esq., LLM

2:30 – 2:45 Break and networking

2:45 – 4:30 Gas Lease Protection & Succession Planning — Julie Steinbacher & Robert P. Hager

4:30-4:45 Closing remarks, evaluation, and networking

Audience

This seminar is intended for Accountants, Tax Preparers, Attorneys, Financial Planners, or for anyone interested in the topic.*

Educational Contact Hours

Accountants: CPEs — 7.5

Attorneys: CLEs — 6.5 substantive

*Program prerequisites: None; Program level: Intermediate; Advance preparation: None; Instructional method: Group-live.



Cost: \$79.00

Fee includes CPE and CLE credits. Certificates will be issued at the conclusion of the seminar. Please provide the complete name of each person registered with your payment.

Checks should be made payable to ELTCP.* Payment may be mailed to:
ELTCP

413 Washington Blvd.
Williamsport, PA 17701

Payment will be accepted at the door

Registration and Questions

To register or for more information, please call Laurie at 570-322-2077 by Monday December 19, 2011.

*Cancellation with full refund may be made prior to December 15, 2011.

Overview & Objectives

This seminar is intended to give the accountant, tax preparer or attorney an intermediate level of understanding of the cooperative relationship between legal planning and tax planning, as well as insight into the options and decisions influencing estate and long-term health care planning. These include discussion about wealth protection planning; gas lease / royalty protection, and business succession planning, including the various tax issues that are associated. The participant will gain an understanding, and will discuss, issues faced by people who have complex estate planning decisions. In addition, insight into the influence of technology, including Internet security issues and social media networking, will allow the participant to develop an understanding of the application of technology to their business.



The Holiday Inn
is located at:
100 Pine Street
Williamsport, PA 17701

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