



**Laureate Center**  
for **Wealth Advisors**

**The Gathering 2019**  
San Diego, California

*Family Wealth and Business Succession*

**14**  
**CRITICAL AND THOUGHT**  
**PROVOKING TOPICS**

**26**  
**THOUGHT**  
**LEADER EXPERTS**

**9**  
**DIFFERENT**  
**DISCIPLINES**

**14**  
**CE HOURS (MCLE)**  
(CPA, CFP AND DOI APPLIED FOR)



**70'S THEMED PARTY**  
**UNFORGETTABLE MEMORIES**  
**LIFELONG FRIENDS**



Go to  
[www.scinstitute.org/Gathering-2019](http://www.scinstitute.org/Gathering-2019) for details!

Please join us for our 15th annual Gathering for two days of shared insights, education, and collegiality. The Gathering is an annual event for all advisors in Estate, Business, and Wealth Strategies Planning. As we gather and work together we can, through collegiality and collaboration, provide the leadership our clients are seeking to offer clarity and direction for their planning needs.



The presenters are each experts in their field who enjoy sharing and who give of themselves and their time. Their unique skills, wisdom, and judgment are truly invaluable. With our **Thought Leader Community** as your resource, you don't have to master the answer to every client quandary. Instead you become courageously armed with the right questions and resources. *This We-driven mindset is transformational for you, your practice, and your clients.*

**Keynote Speaker:**

Day 1: Peter Myers, Esq. and Steve Mancini, Esq.  
Day 2: Chris Snider and Scott Snider, Exit Planning Institute

**Moderators:**

Shelley Lightfoot and Joe Strazzeri, Esq.

**Program Location and Accommodations:**

San Diego Marriott Del Mar | Main Ballroom  
11966 El Camino Real | San Diego, California 92130  
**(858) 523-1700**

**"The Gathering" Room Rate:**

\$169; Reserve your room by February 1, 2019  
(look for reservation link at [www.scinstitute.org/Gathering-2019](http://www.scinstitute.org/Gathering-2019))

**Dates and Times:**

Thursday, February 21, 2019 - *Tax and Estate Planning Day*  
7:00am - 4:30pm Registration & General Sessions  
5:30pm - 11:00pm Circle of Friends Charity Gala benefiting  
Rady Children's Hospital Autism Discovery Institute

Friday, February 22, 2019 - *Business and Succession Planning Day*  
7:30am - 5:15pm Check-in & General Sessions  
5:15pm - 6:30pm Reception

**Participation Fee:** Both Days - \$420 (includes Gala); One Day - \$260

**Continuing Education Credits:**

CFP & CA Insurance – credits applied for  
CPA & MCLE (approved provider #11857) - credits offered

**To Attend:**

Register on-line at [www.scinstitute.org/Gathering-2019](http://www.scinstitute.org/Gathering-2019), or call 858-200-1911

# The Gathering 2019

## TOPICS AND SPEAKERS



### Day One Agenda Tax and Estate Planning

- 7:00am - 8:00am Registration, Breakfast, Meet the Presenters and Sponsors
- 8:00am - 8:10am Opening Remarks
- 8:10am - 9:10am KEYNOTE: Hot Topics for 2019  
*presented by Peter Myers, Esq. and Steve Mancini, Esq.*
- 9:10am - 9:40am Break
- 9:40am - 10:30am Qualified Opportunity Zones - Advanced Techniques for Building Tax - Free Wealth  
*presented by Greg Banner, CFP®, CLU®, CRTP and Aman Badyal, Esq.*
- 10:30am - 11:20am Competency and Risk - Are You Liable?  
*presented by Dr. Michael G. Plopper and Scott Stewart, Esq.*
- 11:20am - 12:10pm The ABLE Act and SNT Taxation Issues for the Financial/Estate Planning Practitioner  
*presented by Stephen Dale, Esq.*
- 12:10pm - 1:30pm Sponsored Lunch - Ultimate Estate Planner
- 1:30pm - 2:20pm What's Old is New Again - Insurance Planning Under the New Tax Law  
*presented by Trey Fairman, JD, LL.M. and Ryan Barradas, CLU®*
- 2:20pm - 3:10pm Essential Estate Planning Considerations During the Divorce Process  
*presented by Joseph Matuk, Esq. and Veronica Lopez, Esq.*
- 3:10pm - 3:30pm Break
- 3:30pm - 4:20pm The Ins and Outs of Charitable Gifting in Today's World  
*presented by Kimberly Vawter, JD and Elise Webster*
- 4:20pm - 4:30pm Taking it Home  
*presented by Joe Strazzeri, Esq. and Shelley Lightfoot*

5:30pm - 11:00pm



### Day Two Agenda Business and Succession Planning

- 7:30am - 8:30am Check-in and Breakfast
- 8:30am - 8:40am Opening Remarks
- 8:40am - 9:40am KEYNOTE: Fishing for Value - An Exit Planning Case Study  
*presented by Chris Snider and Scott Snider*
- 9:40am - 10:10am Break
- 10:10am - 11:00am Panel Discussion with Business Owners in Various Stages of Exit - Keep, Transition, or Sell...and How?  
*moderated by Joe Strazzeri, Esq.*
- 11:00am - 11:50am The Case for Nevada Trusts for Non-Resident Business Owners  
*presented by Rebecca Haines, Esq., Joe Strazzeri, Esq. and Cody Parks, Esq., LL.M*
- 11:50am - 1:20pm Sponsored Lunch
- 1:20pm - 2:10pm The Anatomy, Choices, and Litigation Landmines of ESOPs  
*presented by Melisa Silverman, JD, CEPA, CVA, SBA, CEMA and Chelsea Mikula Tomko, Esq.*
- 2:10pm - 3:00pm New Tax Rules for You and Your Business Owners including 199A, QSBS, etc.  
*presented by Keith Troutman, CPA and Laura Stees, CPA*
- 3:00pm - 3:20pm Break
- 3:20pm - 4:10pm Business Owner Disability - A Trustee's Perspective on Transitioning a Family Business in the Face of Key Person Incapacity  
*presented by Sharon Buck, CFP®, CPWA, EA, ChFC, CTFA, CEPA, ADFA, CLU, TEP and Ann Rosevear, JD*
- 4:10pm - 5:00pm Business & Real Estate Opportunities to Partner with Foreign Companies & Investors  
*presented by Robert Garmo, Esq. and Freddy Garmo, Esq.*
- 5:00pm - 5:15pm Taking it Home  
*presented by Joe Strazzeri, Esq. and Shelley Lightfoot*

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