



is providing the luncheon for this seminar. We deeply appreciate Mercantile Trust Services' generous sponsorship.

About the Transitions Foundation...

The Transitions Foundation was founded in 2002 for the sole purpose of supporting the programs and services of Transitions of Western Illinois. The Foundation is a not-for-profit, 501 (c)(3) organization.

Transitions is a community-based, not-for-profit agency that provides an array of mental health, rehabilitation, and educational services. The agency's mission is to ***inspire growth and empower people of all abilities to live full and meaningful lives.***

Gifts to the Transitions Foundation support Transitions' programs, enabling people, regardless of their financial abilities, to receive needed services.

For More Information...

For more information about the Transitions Foundation or the programs and services of Transitions, call



Barbara Baker Chapin
Director of Development
(217) 223-0413

Acronym Soup in Succession Planning: The Use of IDGTs, GRATs and SLATs



Wednesday, September 28, 2022
11:30 a.m. - 2:00 p.m.

Quincy Country Club
2410 State Street

Sponsored by the
Transitions Foundation
4409 Maine Street
Quincy, Illinois 62305

About the Speaker...



Roger A. McEowen is a Professor of Agricultural Law and Taxation at Washburn University School of Law in Topeka, Kansas. He is widely published and conducts approximately 80-100 seminars annually across the United States.

He is a frequent guest on various media outlets, including a weekly interview on RFD-TV where he discusses various agricultural law and tax topics with the RFD-TV hosts. He also has a national daily radio program, "*The Agricultural Law and Tax Report*". This daily program airs locally on WTAD-AM and FM. He received a B.S. in Management from Purdue University, an M.S. in Agricultural Economics from Iowa State University, and a J.D. from the Drake University School of Law.

Program...

This seminar will cover techniques for transferring wealth to subsequent generations in a tax efficient manner, while benefiting a spouse for life. Mr. McEowen will discuss engaging clients in the estate/business succession planning process, utilizing asset protection strategies properly, proper practice procedures to identify potentially troublesome clients, and the use of IDGTs and GRATs and other acronyms of estate / succession planning.

Objectives...

- Increase attendees' skills in engaging clients in the estate/business succession planning process.
- Increase attendees' knowledge of and use of asset protection strategies.
- Increase attendees' knowledge of practice procedures to identify potentially troublesome clients.
- Increase attendees' knowledge of IDGTs, GRATs and other acronyms of estate/succession planning.

Schedule...

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| 11:30 a.m. | Introductions and Lunch Served |
| 11:40 a.m. | Getting Clients Engaged in the Estate / Business Succession Planning Process |
| 12:15 p.m. | Engaging in Asset Protection Strategies Properly
Proper Practice Procedures to Identify Potentially Troublesome Clients |
| 1:00 p.m. | Break |
| 1:10 p.m. | IDGTs and GRATs and other Acronyms of Estate / Succession Planning
Questions/Answers |
| 2:00 p.m. | Seminar Concludes |

Continuing Education Credits...

The Transitions Foundation has submitted the seminar program to the MCLE boards in Illinois and Missouri. The course has been approved for 2.00 Illinois MCLE general credit hours; it has been approved for 2.6 Missouri general credit hours. The Foundation is also a continuing education sponsor for the IL Dept. of Financial & Professional Regulation so that CPEs can be earned for attendance.