

EAST TEXAS ESTATE PLANNING COUNCIL



COUNCIL MEETING: **Friday** November 22, 2019

WHERE: Hollytree Country Club

TIME: Register and Lunch: 11:30 AM – 12:00 PM
Program: 12:00 PM – 1:00 PM

SPEAKER: Jamie Katzen

TOPIC: “Update on Trends and Strategies in Charitable Planning”

Jamie is a Senior Counsel at Gray Reed & McGraw Attorney & Counselors in Dallas Texas. Jamie is dedicated to serving clients, their families and businesses from generation to generation. He focuses his practice on domestic and international estate planning (wealth transfer), tax planning, estate and trust administration and wealth preservation.

Jamie is active in many organizations such as Society of Trust and Estate Practitioners (STEP), Dallas Estate Planning Council, State Bar of Texas (Tax Section), American Bar Association (Tax Section) and the Dallas Bar Association (Tax Section and Probate Trusts & Estates Section).

Jamie is a graduate Southern Methodist University Dedman School of Law with an LL.M. in Taxation (2012), a J.D. from St. Mary's University School of Law (2008), and a B.A. in History from the University of Kansas (2005).

C. E. CREDIT: No prerequisites required.

CPAs: One hour
Attorneys: One hour

CFP: One hour
CLU: One hour - based on course content

Please RSVP no later than Wednesday, November 20, 2019.

Cancellations must be made prior to 12:00 noon on Wednesday November 20, 2019.

Please be prepared to pay for your meal at the time of meeting.

Member(s) Attending: _____

If bringing Guests, how many? _____

Please provide the names of your guests: _____

Buffet Style Lunch – Cost \$20.00 (Due at time of meeting)

MAIL, PHONE, FAX, OR E-MAIL YOUR REPLY TO:

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