

**REGISTRATION  
FORM**

PLEASE CHECK ONE OF THE FOLLOWING:

I WILL BE ATTENDING  
ALONE.

I WILL BE ATTENDING  
WITH OTHERS.

Total attending: \_\_\_\_\_

Name: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

**NAMES & EMAIL ADDRESSES OF  
ADDITIONAL REGISTRANTS:**

Name: \_\_\_\_\_

Email: \_\_\_\_\_

Name: \_\_\_\_\_

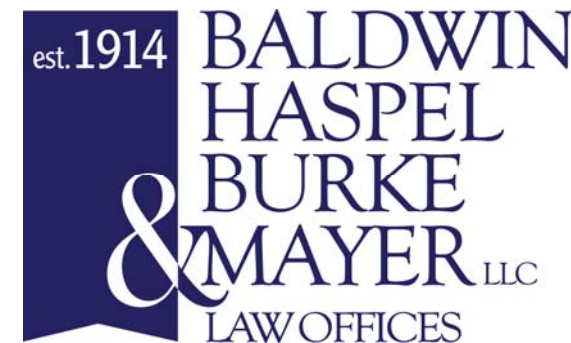
Email: \_\_\_\_\_

Name: \_\_\_\_\_

Email: \_\_\_\_\_

**\*Please return by May 9, 2018  
via email, fax or mail.**

**BALDWIN HASPEL BURKE & MAYER, LLC**  
1100 POYDRAS STREET, 36<sup>th</sup> FLOOR  
NEW ORLEANS, LA 70163



**35<sup>th</sup> ANNUAL ESTATE  
PLANNING SEMINAR  
FOR  
LIFE UNDERWRITERS**

**Wednesday, May 16, 2018**

**\*\*LOCATION\*\***

Sheraton Metairie  
4 Galleria Boulevard  
Metairie, LA 70001

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For additional information contact  
Katie Kelly at 504-585-7816 or  
kkelly@hbmlaw.com.

## 2018 AGENDA

**1:00-1:30 P.M.**

**Registration and Opening Remarks**

**1:30 P.M.-2:30 P.M.**

**Preparing an Estate Plan in View of  
the Tax Cuts and Jobs Act of 2017**

*Speaker:* John Rouchell

**2:30 P.M.-3:00 P.M.**

**Tax Law Update**

*Speaker:* Leon Rittenberg III

**3:00 P.M.-3:30 P.M.**

**Break**

**3:30 P.M.-5:00 P.M.**

**Estate Planning Case Study and  
Panel Discussion**

*Speakers:* Karl Zimmermann, Andrew Sullivan,  
Matthew Treuting & Jack Casanova

**5:00 P.M. Cocktail Reception**

## 35<sup>TH</sup> ANNUAL ESTATE PLANNING SEMINAR FOR LIFE UNDERWRITERS

Our tax and estate planning group has developed another program of interest to life underwriters. This year's program will include a discussion on the preparation of an estate plan in view of the Tax Cuts and Jobs Act of 2017, followed by a tax law update. The program will conclude with a case study and panel discussion on estate planning for closely-held businesses.

### SEMINAR OVERVIEW:

- Eligible for **three (3)** hours of **CE** (pending approval by the LDI and CFP Board)
- **FREE** of charge
- Light snacks and beverages provided throughout the day
- Program outlines distributed
- Cocktail reception to follow

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Please complete this registration form  
and return it to our office by  
**May 9, 2018.**

## RETURN YOUR REGISTRATION TO:

**EMAIL:** [KKELLY@BHBMLAW.COM](mailto:KKELLY@BHBMLAW.COM)

**FAX:**

504-293-5650

**MAIL:**

ATTN: KATIE KELLY  
BALDWIN HASPEL BURKE & MAYER  
1100 POYDRAS STREET, 36<sup>TH</sup> FLOOR  
NEW ORLEANS, LA 70163

**REGISTRATION: 1:00-1:30 P.M.**

**PROGRAM: 1:30-5:00 P.M.**

**RECEPTION: 5:00 P.M.**

**WEDNESDAY, MAY 16, 2018**

**\*\*LOCATION\*\***

**SHERATON METAIRIE  
4 GALLERIA BOULEVARD  
METAIRIE, LA 70001**

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