

Southern Arizona Estate Planning Council

3900 E. Timrod St
Tucson, AZ 85711-4170

www.saepc.org
admin@saepc.org

OFFICERS

President
Colleen Cacy, Attorney
Vice President/Program Chair
James Underhill, CFP®

Secretary
Anne C. Hoff, CPA

Treasurer
Roxanne Fickett, CTFA

Immediate Past President
Martin Zeldin, CPA

DIRECTORS

Estate Planners' Day
Scott Styrmo, CPA, CFP®

Membership Development
Assistant Secretary
Robert Fleming, CELA

Continuing Education
Assistant Treasurer
Benjamin Burnside, CELA

2013-2014

Meeting Dates

September 18th
5:15pm
Arizona Inn

October 16th
5:15pm
Arizona Inn

November 13th
5:15pm
Arizona Inn

December 11th
5:15pm
Arizona Inn

January 24th
Estate Planners' Day
8:00am-4:30pm
Doubletree Hotel

February 12th
5:15pm
Arizona Inn

March 4th
5:15pm
Arizona Inn

April 23rd
5:15pm
Arizona Inn

Speaker: Mickey R. Davis, JD
Davis & Willms, PLLC
Houston, TX

Date: **TUESDAY, March 4, 2014**

Place: Arizona Inn, 2200 E. Elm Street

Time: Registration and cocktails 5:15pm - 5:45pm
Dinner 5:45pm - 6:30pm
Program 6:30pm - 7:30pm

Income Taxation of Trusts and Estates: Ten Things Estate Planners Need to Know

Higher income tax rates and increased estate tax exemptions have resulted in a paradigm shift for estate planners. The income tax rules applicable to trusts and estates have a new importance in planning and administration.

Review practical issues in planning to minimize income tax liabilities in the context of trusts and estates, including immediate pre-death income tax planning opportunities, basis and other income tax issues arising at death, and administering trusts and estates to minimize income taxes.

SPEAKER

Mickey R. Davis is a partner in the firm of Davis & Willms, PLLC in Houston, Texas. He received his undergraduate degree (B.B.A. with high honors) from the University of Arizona and his law degree (J.D. with high honors) from the University of Texas. Mickey is Board Certified in Estate Planning and Probate Law by the Texas Board of Legal Specialization, and is a Fellow of the American College of Trust and Estate Counsel, where he has served as the Editor of The ACTEC Law Journal, and currently serves as chairman of the Estate and Gift Tax Committee. Mickey is listed in Best Lawyers in America (Trusts and Estates), was named *Best Lawyers'* 2013 Houston Trusts and Estates "Lawyer of the Year" and named by *Texas Lawyer* as a 2013 "Top Notch Lawyer" for Trusts and Estates. Mickey is a licensed C.P.A. and a member of the Texas Society of CPA's. In addition to his law practice, Mickey has served since 1988 as an Adjunct Professor at the University of Houston Law Center, where he teaches Income Taxation of Trusts and Estates, and Postmortem Estate Planning.

RESERVATIONS

RSVP via email to admin@saepc.org by **Tues., Feb. 25th**. You will be sent a return email confirmation. If you have signed up and cannot make it, send an email to admin@saepc.org by **1:00 pm on Friday, February 28th**.

**PLEASE NOTE THAT THIS MEETING IS ON TUESDAY -
NOT WEDNESDAY TO ACCOMMODATE THE SPEAKER'S SCHEDULE !**