2010 ESTATE PLANNING

CONTINUING LEGAL EDUCATION PROGRAM

STATE BAR OF SOUTH DAKOTA

SIOUX FALLS, SOUTH DAKOTA

September 24, 2010

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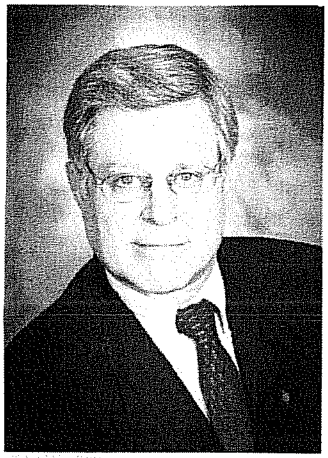

Robert G. Alexander, JD, LL.M., AEP, EPLS

Professional Biography 2010

Attorney Robert G. Alexander is the President and majority shareholder of Alexander & Klemmer, S.C., located in Milwaukee, Wisconsin. He earned a B.A. in English from the University of Wisconsin-Madison, J.D. from the University of Wisconsin-Madison Law School, and an LL.M. in Taxation from DePaul University. Mr. Alexander entered into private practice in 1978 and concentrates his practice in the areas of wealth transfer, asset protection and family business planning, including discretionary dynasty trusts, asset protection trusts, life insurance planning, federal estate and gift taxation; trust and estate administration; fiduciary income taxation; charitable planning; business organization and succession planning and international tax planning. He has earned professional designations as a Board Certified Estate Planning Law Specialist (EPLS) as accredited by the American Bar Association, and as an Accredited Estate Planner (AEP) by the National Association of Estate Planners & Councils (NAEPC). He is AV rated by Martindale-Hubbell, its highest rating in legal ability and ethical standards, a Wisconsin Super-Lawyer and a Milwaukee Five Star Wealth Manager.

Mr. Alexander currently holds the office of secretary for the National Association of Estate Planners & Councils and serves on the board of directors of the Estate Planning Law Specialist Board, (EPLS), Inc. (2003 to the present). He is the chairperson of the NAEPC Foundation Committee, serves on the NAEPC Committee administering the Accredited Estate Planner (AEP) designation, and the Conference Committee. He is an NAEPC delegate to the Synergy Summit, a leading national estate, tax, and financial think tank, where he also served as the chairperson, served on the editorial advising board of *Wealth Management Magazine* (2007-2009); and is on the professional advisors panel for *The Elite Advisor Forum.* Mr. Alexander served for two years as the original Publishing Editor of the NAEPC's academic journal, *The NAEPC Journal of Estate and Tax Planning*; and for three years on the board of directors of the Milwaukee Estate Planning Council. Currently he serves on the board of directors for the Milwaukee Chapter of the Society of Financial Service Professionals (SFSP).

He is a nationally known author and speaker who lectures and teaches extensively for both public and private organizations, including the National Association of Estate Planners & Councils (NAEPC), national continuing legal education providers, the Wisconsin Institute of CPA's, major insurance companies, brokerage firms, banks, trust companies, community foundations, charitable organizations, and various local colleges.

Mr. Alexander is a member of the American Bar Association sections on Real Property, Probate and Trust Law and Taxation; the State Bar of Wisconsin; the National Association of Estate Planners & Councils; the Milwaukee and Waukesha Estate Planning Councils; the Society of Financial Service Professionals (SFSP) and the Society of Trust and Estate Practitioners (STEP). Mr. Alexander is admitted to practice in Wisconsin, the U.S. District for the Eastern and Western Districts of Wisconsin, the Seventh Circuit Court of Appeals, and the U.S. Tax Court.

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Significant Recent Speaking Engagements Include:

1. November 2009 - Inter-face Conference on Distressed Real Estate – Atlanta, Georgia. France Publications.
   - Asset Preservation & Protection Considerations.

2. September 2009 – Real Estate's Place in Wealth Management & Financial Planning Conference – Dallas, Texas. France Publications.
   – Estate, Tax and Asset Protection Strategies. Co-speaker: Atty. Stan Blend.

3. July 2009 – Northwestern Mutual Financial Network Annual Convention – Milwaukee, Wisconsin. Physicians Nationwide.
   - The Beneficiary Defective Inheritor's Trust – A Powerful New Wealth Planning Strategy

4. June 2009 - Real Estate's Place in Wealth Management and Financial Planning – Atlanta, Georgia. France Publications.
   - Legal & Tax Strategies for New Investments, Already Owned and To Be Passed-On Commercial and Residential Property

5. May 2009 - Spokane Estate Planning Council Annual Meeting. Gonzaga University Law School
   - Super-charging Wealth Transfer and Asset Protection Planning with Grantor Trusts
   - Selected Issues in Fiduciary Duties and Liabilities
   - Tax Disasters and Other Conundrums: What Can Be Done to Correct All These Problems

6. March 2009 – Northwestern Mutual Life Insurance Company. The Estate and Business Planning Specialists Conference; Milwaukee, WI
   - Beneficiary Defective Inheritor's Trust ("BDIT") – Finessing the Pipe Dream

7. January 2009 – Palm Beach Tax Institute; Palm Beach, FL.
   - Income Tax Issues With Respect to LLC and Partnership Interests Held In Trust

8. Society of Financial Services Professionals 2008 Forum – Las Vegas, Nevada;
   - Advanced Estate and Asset Protection Planning for Tax-Qualified Assets
   - Panelist: Family Business Succession Planning

9. 2008 Sid Kess-The Ultimate Estate and Retirement Conference - Las Vegas, NV.
   - What Every Practitioner Needs to Know About International Estate Planning.

10. Charles Schwab Impact 2008- Atlanta, GA.
    - Super-Charging Wealth Transfer and Asset Protection Planning with Grantor Trusts.

Significant Current Publications include:

1. <u>The Cash Value Beneficiary Defective Inheritor's Trust (The "Cash Value BDIT") – Creating a More Flexible and Comprehensive Wealth Accumulation and Retirement Plan.</u> NYU Review of

Employee Benefits and Executive Compensation; Matthew Bender & Company, Inc. November, 2009.

2. Enhancing the Planning Value of GRATs - Part 2 – CCH: Financial and Estate Planning Report No. 352, April 2009, and the Journal of Practical Estate Planning, Feb./Mar. 2009.

3. Enhancing the Planning Value of GRATs - Part I – CCH: Financial and Estate Planning Report No. 350, Feb. 2009, and the Journal of Practical Estate Planning, Nov./Dec. 2008.

4. The Beneficiary Defective Inheritor's Trust (BDIT) – Finessing the Pipe Dream. CCH Practitioner's Strategies, Nov. 2008. Co-authored with Attorney Richard A. Oshins.

5. Combining Cash value Life Insurance with the Beneficiary defective inheritor's Trust ("BDIT"), CCH Practitioner's Strategies, Nov. 2009. Co-authored with Attorney Kristen E. Simmons.

6. The Beneficiary Defective Inheritor's Trust: Creating the Idea Wealth Transfer and Asset Protection Plan. The Society of Financial Service Professionals. May 2010.

7. Creative Wealth Planning with Grantor Trusts, Family Limited Partnerships and Limited Liability Companies. Texas Tech Law School. Estate Planning and Community Property Law Journal. Volume 2, Book 2. Spring 2010.

8. The Cash Value BDIT – Modern Portfolio Theory and Life Insurance. The Society of Financial Service Professionals. August 2010.

Significant Books Include:

1. Trust Administration and Trustee Selection. Chicago: Guarantee Trust Company, 2003. Rev. Ed. Milwaukee: Wealth Planning Publishing International, LLC, 2009.

2. Succession Planning for Closely Held Businesses. Chicago: Guarantee Trust Company, 2003.

3. Wealth Planning with Domestic and Foreign Asset Protection Trusts: A Resource and Study Guide. Rev. Ed. Milwaukee: Wealth Planning Publishing International, LLC, 2010.

4. Lifetime and Testamentary Charitable Planning: A Resource and Study Guide. Milwaukee: Wealth Planning Publishing International, LLC, 2006.

5. Tax and Estate Planning Under the 2001 Tax Act. Chicago: Guarantee Trust Company, 2001. Rev. Ed. 2002.

Forthcoming Publications:

1. Modern Wealth Planning with Discretionary Dynasty Trusts: A Practitioner's Guide. Milwaukee: Wealth Planning Publishing International, LLC. Fall 2010.

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2. The Cash Value Beneficiary Defective Inheritor's Trust (the Cash Value BDIT) – Part II. NYU Review of Employee Benefits and Executive Compensation; Matthew Bender & Company, Inc. November, 2010. Co-authored with Atty. Larry Brody and Gary Flotron, CLU, ChFC, AEP.

Upcoming Major Conferences:

1. Northwestern Mutual Life Insurance Company – Annual Conference, Milwaukee, Wis., July 2010.
2. South Dakota State Bar Association – Sioux Falls, S.D., September 2010.
3. Northwestern Mutual Life Insurance Company – Financial Advisor's Annual Conference, Milwaukee, Wis., October, 2010.
4. Society of Financial Service Professionals Forum – Orlando, Florida, October 2010.
5. Society of Financial Service Professionals Advanced Institute – Tucson, Arizona, February 2011.

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