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The
RED SHIELD
Symposium

WEDNESDAY, SEPTEMBER 29, 2021

Featuring National Speakers:

Ann Burns (Lathrop GPM LLP)
Professor Samuel A. Donaldson (Georgia State University College of Law)

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TheRedShield.org

Presented by:



The
RED SHIELD
Symposium

WEDNESDAY, SEPTEMBER 29, 2021

8 A.M. CT/9 A.M. ET TO 3 P.M. CT/4 P.M. ET

*This is your invitation to The Salvation Army's
renowned estate planning conference.*

Featuring National Speakers:

Ann Burns (Lathrop GPM LLP)
Professor Samuel A. Donaldson (Georgia State University College of Law)

WHO SHOULD ATTEND?

- ATTORNEYS
- CERTIFIED FINANCIAL PLANNERS
- ACCOUNTANTS
- BANK TRUST OFFICERS
- OTHER PLANNING PROFESSIONALS

REGISTER ONLINE NOW- TheRedShield.org

The Red Shield Symposium is an in-person webcast focusing on bringing together donor advisors to learn the latest on estate planning, the effects legislation has on charitable donations and how The Salvation Army will meet your clients' philanthropic goals.

At least 5.0 hours of continuing education (including 1.0 hour of ethics credit) pending for the following certifications:

CLE: Attorney / CPE: Accountant / CLU: Chartered Life Underwriter / CFP: Certified Financial Planner / ChFC: Chartered Financial Consultant / CTFA: Certified Trust and Fiduciary Advisor / CAP: Chartered Advisor in Philanthropy

No partial credits will be offered

THIS IS A PAPERLESS EVENT!



- Learn, interact, and take charge of your experience by bringing your own laptop, tablet, or even smart phone.



- Hassle-free check-in and out process, assurance of credits, submit questions to the speakers during Q&A sessions, ability to complete online surveys, and more.

RED SHIELD SYMPOSIUM AGENDA

All times listed are Central Time

8 - 9:30 a.m.	Recent Developments in the Federal Tax Laws – Professor Samuel A. Donaldson
9:30 - 9:45 a.m.	Break
9:45 - 10:45 a.m.	Ethics – Don't Trip Up! – Ann Burns
10:45 a.m. – 12:15 p.m.	Lunch Program
12:15 - 1:45 p.m.	Latest Trends and Strategies for the Estate Plan of the Future – Ann Burns and Professor Samuel A. Donaldson
1:45 – 2 p.m.	Break
2 - 2:30 p.m.	Latest Trends and Strategies, Continued
2:30 – 3 p.m.	Final Questions and Answers - Ann Burns and Professor Samuel A. Donaldson

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ANN BURNS



Ann Burns is a member of the Trust, Estate and Legacy Planning group at Lathrop GPM LLP. Her practice focuses on estate and charitable planning, business succession planning, estate and trust administration, and fiduciary and tax litigation.

Ann brings a unique mix of skills to her law practice as a certified public accountant and attorney. She represents multigenerational families of wealth throughout the country and individual and corporate trustees in fiduciary and tax matters.

Ann chairs the board of a private client family office, is President-Elect of the American College of Trust and Estate Counsel and a member of the Board of Trustees of The Minneapolis Foundation.

SAMUEL A. DONALDSON

Samuel A. Donaldson [J.D. University of Arizona; LL.M. (Taxation) University of Florida] is a Professor of Law at Georgia State University in Atlanta. He teaches a number of tax and estate planning courses, as well as courses in the areas of property, commercial law and professional responsibility.

Professor Donaldson is an Academic Fellow of the American College of Trust and Estate Counsel (ACTEC) and a member of the Bar in Washington, Oregon and Arizona. Among his scholarly works, he is a co-author of the popular West casebook, *Federal Income Tax: A Contemporary Approach*, and a co-author of the *Price on Contemporary Estate Planning* treatise published by Wolters Kluwer.

