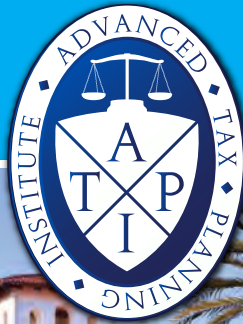


YOU ARE INVITED TO ATTEND THE ANNUAL SUMMER  
**ADVANCED TAX  
PLANNING INSTITUTE 2017**

NORTH AMERICA'S PREMIER EDUCATIONAL  
SYMPOSIUM FOR TAX PROFESSIONALS

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**June 19, 20 & 21, 2017**

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YOU ARE INVITED TO  
ATTEND THE 14TH ANNUAL SUMMER

## ADVANCED TAX PLANNING INSTITUTE 2017

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OMNI LA COSTA RESORT & SPA  
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24 CPE CREDITS  
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This revolutionary event delivers a peerless educational experience along with 24 Continuing Professional Education (CPE) credits to CPAs and 15 CLE credits to Attorneys. CPE Credits earned at the ATPI are approved by The National Association of State Boards of Accountancy.

AS FEATURED IN:



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You do not want to miss the 2017 Advanced Tax Planning Institute, North America's Premier Educational Symposium for Elite Virtual Family Offices and CPA firms. This is a unique 3-day experience, where you can expect World-Class Leadership & Relationship Coaching plus a unique chance to meet many of our country's most elite specialists who support many of the leading Family Offices, CPA Firms and Law Firms in the country. Thought leaders covering Best Practices as well as various sections of the US Tax Code fly in from around the country to share their specialty and life's work with our incredible community.

- Offer Best-of-Breed Virtual Family Office Services to your Ultra-Affluent Clients
- Operate as the "CPA Firm Of The Future" and ensure that your very best clients start telling your story => Organic Growth
- See actual case studies of powerful tax mitigation strategies: Capital Gains Split Dollar, CLATs, Advanced Charitable Strategies, Charitable LLCs, Leveraged ESOPs with Warrants, IC-DISC, Cost Segregation, and Captives, just to name a few
- Use Strategic Leverage to Expand your Brain-Trust
- Cutting Edge Best Practices and Leadership Training
- Learn from the very best specialists in the country covering over 80k+ pages of the US Tax Code
- Have 6 simple and powerful conversations with your best clients that will take your relationships to the next level
- Offer an irresistible value proposition to attract those affluent business owners planning on leaving your competitors

### AGENDA

	JUNE 19TH	JUNE 20TH	JUNE 21ST
8:30AM	WELCOME TO THE 14TH ATPI Alexander Sonkin (8:30 - 9am)	STRATEGIC LEVERAGE WITHOUT RISK Anthony Lombardi (8:30 - 9am)	CREATE TIME FOR WHAT'S MOST IMPORTANT Anthony Lombardi (8:30 - 9am)
9AM	OPERATE AS THE FIRM OF THE FUTURE Anthony Lombardi (9 - 11am)	MULTI DISCIPLINARY COST REDUCTION STRATEGIES Kirk Conole (9 - 9:45am)	OFFERING VIRTUAL FAMILY OFFICE SOLUTIONS Kereti Tuioi (9 - 10am)
10AM		INNOVATIVE INCOME & ESTATE TAX PLANNING STRATEGIES Kereti Tuioi (9:45 - 10:30am)	ADVANCED CAPTIVE STRATEGIES Wesley Sierk (10 - 11am)
11AM	BREAK 10:30 - 11:15am	BREAK 10:30 - 10:45am	BREAK 10:30 - 11:15am
	EIGHT GREAT QUESTIONS TO ENGAGE ULTRA-AFFLUENT CLIENTS Richard Muscio (11:15 - 12:15pm)	R&D TAX CREDITS AND IC DISC ADVANCED PLANNING Jonathan Glasser & Kimberly Rehmeyer (10:45 - 11:30am)	HOW INSTITUTIONAL INVESTORS MITIGATE RISK AND TAXES Alexander Sonkin (11:15 - 12:15pm)
		LIFE SETTLEMENTS AND POLICY VALUATIONS Jamie Mendelsohn (11:30 - 12:15pm)	
LUNCH	[Landscape Image]		
1PM	THE ABUNDANCE OF LEVERAGE Anthony Lombardi (1:15 - 2:30pm)	COST SEGREGATION Joel Grushkin (1:15 - 2pm)	INCOME TAX STRATEGY WITH RETIREMENT BENEFITS Ken Crabb (1:15 - 2pm)
2PM	OPERATING AS A VIRTUAL FAMILY OFFICE Anthony Lombardi & Richard Muscio (2:30 - 3:15pm)	ADVANCED ESOP STRATEGIES Roy Farmer (2 - 2:45pm)	UNIQUE REAL ESTATE INVESTMENT OPPORTUNITIES Jack Fisher (2 - 2:45pm)
3PM	BREAK 3:15 - 3:30pm	BREAK 2:45 - 3pm	BREAK 3:30 - 3:45pm
	FEAR FACTORS: OVERCOMING OBSTACLES (AND EXCUSES!) Erin Daiber (3:30 - 4:15pm)	REVOLUTIONARY HEALTH INSURANCE SOLUTION Jay Jensen (3 - 3:45pm)	ADVANCED CHARITABLE STRATEGIES Evan Unzelman (2:45 - 3:30pm)
	THE BUSINESS OF RELATIONSHIP IS LOVE Anthony Lombardi (4:15 - 5pm)	PROSPECTIVE TAX REFORM AND ITS IMPACT ON PROACTIVE PLANNING Greg Bertsch (3:45 - 4:30pm)	GLOBAL, COMPREHENSIVE REAL ESTATE OPPORTUNITIES Robert Boladian (3:45 - 4:30pm)
5PM		ALTERNATIVE STRATEGIES USING ASSET CLASSES Dan Darchuck (4:30 - 5:15pm)	BECAUSE BETTER MATTERS Anthony Lombardi (4:30 - 5:15pm)

### FEATURED SPEAKERS AND THOUGHT LEADERS



Anthony Lombardi



Richard Muscio



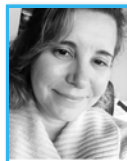
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Erin Daiber



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Dan Darchuck



Evan Unzelman



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Jamie Mendelsohn



Jack Fisher



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Joel Grushkin



Roy Farmer



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