You’ll be able to:

**Evaluate** fundamental tools in estate planning practice.

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**Utilize** common retirement asset planning strategies.

**Understand** how to apply Generation Skipping Transfer Tax planning to trusts.

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**Reduce** tax liability, preserve liquidity and protect assets with tips demonstrated in our succession planning case study.
Facility

Susan Jones, J.D., CFP
Director at BKD CPA's & Advisors

Ms. Jones has almost 15 years of experience with sophisticated individual and fiduciary income, gift and estate tax planning and compliance and fiduciary accounting. She also provides proactive executive compensation planning and succession planning for high net-worth individuals and their family-owned businesses. Ms. Jones’ background includes providing tax consulting services in the St. Louis office of a “Big Four” accounting firm and practicing law in the areas of tax and estate planning in the St. Louis office of an international law firm. She is a board member of The Magic House and chairs the Development Committee. Ms. Jones also serves on the Development Board of Make-A-Wish® Missouri and serves on the University of St. Louis Women's Leadership Society Cabinet as co-chair of the Accountants Market. She is a graduate of St. Louis University with a B.S.B.A. degree in Finance, summa cum laude, and she is a graduate of Washington University School of Law. Ms. Jones is a member of the Bar Association of Metropolitan St. Louis and the American Bar Association’s sections of Taxation and Real Property. Trust and Estate Law. She also is a member of the Estate Planning Council of St. Louis. In addition, Ms. Jones is a CERTIFIED FINANCIAL PLANNER™.

Carrie Schormann
Attorney at Schormann Law Firm, LLC

Ms. Schormann focuses on estate planning, estate and trust administration, and estate and trust litigation for families. Her experience includes all types of basic and advanced estate planning, and formation of business entities, private foundations and charitable trusts. Ms. Schormann prepares estate and gift tax returns and other fiduciary tax returns for her clients. She also represents personal representatives and trustees in connection with estate and trust administration matters. Ms. Schormann works collaboratively with other professionals (such as accountants and financial advisors) so that the client’s needs are met in a holistic and comprehensive manner.

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