



ZLC Financial Group presents ...

UPDATE FOR PROFESSIONALS BREAKFAST SERIES

“Planning for US Estate Tax and CDA Planning”

The US estate tax provisions changed in 2010. Benita will provide an update of cross-border estate planning issues and opportunities for Canadians with US assets and US citizens resident in Canada. The focus will be on identifying situations where there is tax exposure and opportunities to minimize tax.

The Capital Dividend Account presents numerous opportunities for tax effective corporate planning. Jack will revisit the “magic” of the Capital Dividend Account for corporate planning plus look at the two biggest mistakes that corporations make with respect to shareholder life insurance. In addition, we will look at recent updates and trends that impact personal and corporate estate planning.



Benita Loughlin, C.A. – KPMG LLP

Benita is a Partner in KPMG LLP’s International Executive Services tax group. Benita advises individuals on both sides of the border on tax matters related to their residence, compensation including equity compensation, investments, retirement plans, estates, trusts, gifts and expatriation. Benita is a frequent speaker and writer on cross-border tax planning topics. She wrote the Investment in US Real Estate Course for the Institute of Chartered Accountants of BC and has taught the course annually for many years. She is also a Contributing Editor for Tax Planning for You and Your Family.



Jack Shaffer, CFP, CLU, Ch.F.C. – ZLC Financial Group

Jack re-joined ZLC Financial Group in 2009 after spending 9 years as vice-president of advanced marketing for a national managing general agent. Jack has lectured extensively to professional groups including Institute of Chartered Accountants of BC (ICABC), as well as individual accounting and legal firms. He is co-author of, and has been instructor for, both the introductory and the advanced life insurance courses for ICABC. Jack has addressed many insurance industry meetings in both Canada and the U.S., including the Million Dollar Round Table, Top of the Table and the Conference of Advanced Life Underwriting.

Wednesday, October 5, 2011
Four Seasons Hotel – Le Pavilion I & II
791 West Georgia Street

Full Breakfast 7:30 am / Presentation 8:00 am – 9:30 am



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