



HANDLER THAYER, LLP
ATTORNEYS AND COUNSELORS AT LAW

Handler Thayer, LLP
2013 Speaking Engagements

DATE	ATTY	TOPIC	CONFERENCE/SPONSOR	LOCATION
1/24 - 1/26	DAB	<i>Recent Developments Affecting the Income Taxation of Trusts and Estates</i>	American Bar Association 2013 Midyear Meeting	Orlando, FL
1/31 - 2/01	TJH	<i>Global Family Office Regulation: The U.S. Dodd-Frank Act</i>	The European & Swiss Network of Asset and Fund Managers, Family Offices and Strategic Advisers Network (ESAFON)	Geneva, Switzerland
2/5	DAB	<i>After the Fiscal Cliff: Roller Coaster or Merry Go Round? Addressing Income and Transfer Tax Issues</i>	Studio Webcast Law Education Program, sponsored by the Illinois State Bar Association	Webinar
2/9	ADM	<i>Sport Philanthropy</i>	Sports Industry Networking & Career (SINC) Conference	Washington, DC
2/11	TJH	<i>Relevant Income Tax Issues for the Estate Planner</i>	Chicago Bar Association Trust Law Committee	Chicago, IL
2/21	DAB	<i>Estate and Gift Tax Update</i>	Sponsored by Northwest Suburban Estate Planning Council	Arlington Heights, IL
3/3 - 3/4	DAB	<i>Building the Family Experience: Engage and Create Conversations</i>	Sponsored by Inheriting Wisdom and The Family Office Review	Chicago, IL
3/4	TJH	<i>Government Taxation and Regulations: New Rules for 2013 and Beyond</i>	Family Office Winter Forum sponsored by Opal Financial Group	New York, NY
3/6-3/8	TJH	<i>Estate Planning Techniques for the Affluent</i>	8th Annual Family Office Investment Symposium, sponsored by Lido Consulting	Beverly Hills, CA
4/3-4/4	SJT	<i>Family Office and High Net Worth Investors</i>	The National Business Institute	Miami, FL
4/22-4/25	JTB	<i>Keynote speaker</i>	The 2013 Pinnacle Leaders Council sponsored by Pinnacle Insurance and Financial Services, LLC	Fajardo, Puerto Rico
4/23-4/24	DAB	<i>Ethics in Estate Planning: Issues Raised When Attorneys are Asked to Serve as Fiduciaries for Clients</i>	The Estate Planning Short Course, sponsored by the Illinois Institute for Continuing Legal Education	Chicago, IL
4/30	TJH	<i>Current Estate Planning</i>	Sponsored by Trinity Life Settlements, LLC	Webinar

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5/2-5/3	DAB	<i>Ethics in Estate Planning: Issues Raised When Attorneys are Asked to Serve as Fiduciaries for Clients</i>	The Estate Planning Short Course, sponsored by the Illinois Institute for Continuing Legal Education	Champaign, IL
5/8-5/9	TJH	<i>Advanced Estate Planning (keynote presentation)</i>	Annual RIA Forum, sponsored by Lord Abbett and Co.	Jersey City, NJ
5/9	DAB	<i>Fiduciary Income Tax Strategies and Background</i>	Estate and Gift Tax Conference, sponsored by The Illinois CPA Society	Chicago, IL
5/15 - 5/16	TJH	<i>Head-On Solutions for Regulatory Obstacles</i>	Building the Better Family Office sponsored by Financial Research Associates	New York, NY
5/15 - 5/16	TJH	<i>When the Going Gets Tough - To Save or Dissolve the Family Office</i>	Building the Better Family Office sponsored by Financial Research Associates	New York, NY
6/4	TJH	<i>Sophisticated Estate Planning</i>	2013 Estate and High Net Worth Sales Conference sponsored by Northwestern Mutual	Chicago, IL
6/5	SJT	<i>State of Interfamily Direct Co-Investing</i>	The 2nd Annual FOR Awards, sponsored by Family Office Review	Chicago, IL
6/5	DAB	<i>Family Communications: How to Talk About The Good, The Bad and The Ugly</i>	The 2nd Annual FOR Awards, sponsored by Family Office Review	Chicago, IL
6/20	TJH	<i>Relationship Risk: what is it, where is it and how does it affect family sustainability</i>	Sponsored by Opal Financial Group	Webinar
6/24	EEK	<i>The Role and Duties of the Estate Representative in Probate Matters</i>	Sponsored by the National Business Institute	Lisle, IL
6/27	TJH	<i>Relationship Development: what is it, how does it happen, and how do you become the advisor families and family offices choose to work with</i>	Sponsored by Opal Financial Group	Webinar
7/22-7/24	TJH	<i>Government Taxation and Regulation</i>	Opal Family Office Forum, sponsored by Opal Financial Group	Newport, RI
8/8	DAB	<i>Trusts Used For Tax Deduction & Grantor Trusts</i>	National Business Institute	Naperville, IL
8/9	DAB	<i>Trusts Used For Tax Deduction & Grantor Trusts</i>	National Business Institute	Naperville, IL
9/26	TJH	<i>Current Trends in Advanced Planning</i>	RIA Advisor Investment Forum sponsored by Lord Abbett	Newark, NJ

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2013 Speaking Engagements *Continued*

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10/8	TJH	<i>Advanced Tax and Estate Planning</i>	Advanced Wealth Management Conference sponsored by Investment Management Consultants Association	Chicago, IL
10/9	TJH	<i>Advanced Estate Planning</i>	Northwestern Mutual Annual Financial Planning Meeting	Chicago, IL
10/16-10/18	TJH	<i>Panel Moderator – Topic TBD</i>	Family Wealth Alliance 2013 Fall Forum	Chicago, IL
10/16-10/19	DAB	<i>The Transparency Myth in Family Enterprises: The big reveal or less is more</i>	2013 Global Conference sponsored by Family Firm Institute	San Diego, CA
10/23-10/25	TJH	<i>Structuring Your Family Office From the Formation to the Regulation</i>	Opal Family Office West Conference sponsored by Opal Financial Group	Napa, CA
10/25	DAB	<i>Fiduciary Income Tax Fundamentals</i>	Estate Administration Boot Camp, sponsored by the Illinois State Bar Association	Chicago, IL
12/2	TJH	<i>Advanced Planning for Advanced Planning for Ultra-High Net Worth Families, Celebrities, Professional Athletes and Family Offices</i>	The Rusty Humphries Radio Talk Show, hosted by Charles Butler	Internet - Talk Radio Network
12/3	DAB	<i>Maximizing Your Legacy: Year-end Charitable Strategies</i>	MS Wealth Management Dedicated Seminar Series, sponsored by DePaul College of Business	Chicago, IL
12/9	TJH	<i>IRS Global High Wealth Industry and IRS Representation Practice Tips</i>	CBA Trust Law Committee	Chicago, IL