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Howard R. Layton Seminar Series

October 28, 2011
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For information 302-854-6966
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Howard R. Layton Seminar Series

This seminar series was established in memory of Mr. Howard R. Layton, who played an important role on the Southern Delaware Advisory Committee of the Delaware Community Foundation. He also served on the Educational Foundation Investment Committee and the Development Council at Delaware Tech.

Mr. Layton was a nationally-recognized seminar speaker on estate and financial planning topics. He was known for his work as a CPA and as an instructor for 16 1/2 years in the Business Department at Delaware Tech, Owens Campus. This series will perpetuate the legacy of Mr. Layton with on-going seminars and workshops that will serve the Delmarva Peninsula.

Estate Planning for 2011 and Beyond

(Morning Session)

EYD 562 201 8:30 A.M. - 12:30 P.M.

Beginning in 2011, it is anticipated that Congress will make sweeping changes for years to the Internal Revenue Code regarding estate, gift and generation-skipping taxation. Understanding the impact of the new legislation and its uncertainty or certainty in 2011, as the case might be, together with recent case law developments is important to all practitioners in properly advising their clients.

OBJECTIVE: To gain an insight and understanding of estate planning and gift planning issues and techniques given the uncertainty or certainty, in 2011, of Federal estate, gift and generation skipping taxation and recent case law developments.

The Psychology of Planning

(Afternoon Session)

EYD 563 201 1:00 P.M. - 5:00 P.M.

Most estate and financial planning programs tend to deal with tax techniques and number-crunching ideas. However, most of these programs neglect the human issues involved in the estate and financial planning process. This course provides the participant with an understanding of the psychological issues of planning.

OBJECTIVE: To provide participants with an understanding of the "human" issues of estate and financial planning to supplement the participants technical advice.



Howard R. Layton Seminar Series

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Approved for eight hours of Continuing Professional Education (CPE) credit for certified public accountants, public accountants, and enrolled agents by the National Association of State Boards of Accountancy (NASBA). It is valid for said professionals who are licensed in any state. Pending approval for eight hours of Continuing Education (CE) credit for CFP® professionals, CLU Credit, and CTFA (Certified Trust Financial Advisor).

This seminar is approved for eight hours of Continuing Legal Education for Delaware attorneys.

Course Date & Registration:

Friday, October 28, 2011; 8:30 A.M. – 4:30 P.M.

Registration 8:00-8:30 A.M.; lunch included.

- EYD 560 201 Register by 10/14 (All Day) \$190
- EYD 556 201 Register after 10/14 through 10/26 (Subject to availability) \$215
- EYD 562 201 Estate Planning for 2011 & Beyond \$115 (Morning Session)
- EYD 563 201 The Psychology of Planning \$115 (Afternoon Session)

Course Location: Room 540 A-F, William A. Carter Partnership Center, Delaware Technical Community College, Owens Campus, Rt. 18/ Seashore Highway, Georgetown

Course Author and Lecturer

Arthur Joseph Werner, J.D., LL.M. (Taxation)

Mr. Werner is currently a shareholder in the law firm of Werner-Rocca, P.C. His areas of practice include business, tax, financial and estate planning for high net worth individuals.

In addition to the practice of law, Mr. Werner is an adjunct professor in taxation in the Master of Science in Taxation program at Philadelphia University.

He received his Bachelor of Science in Accounting and his Master of Science in Taxation from Widener University. He holds a J.D. in Law from the Delaware Law School.

A member of the Pennsylvania Bar Association, Mr. Werner lectures extensively in the areas of estate planning, financial planning, and estate and gift taxation. In the last decade, he has presented in excess of 500 seminars to certified public accountants and financial planners.

He has been rated as having the highest speaker knowledge in Pennsylvania by the Pennsylvania Institute of CPAs and earned the AICPA Outstanding Discussion Leader Award in Nevada, the Florida Institute of CPAs Outstanding Discussion Leader Award, and the South Carolina Association of CPAs Outstanding Discussion Leader Award.