

PERSONAL INVITATION

You are cordially invited to attend an Exclusive Information Seminar:

REDUCING USA ESTATE TAX - AND PRESERVING THE MULTI-MILLION DOLLAR ESTATE

Jan. 23	2:00 pm	West Palm Beach Marriott West Palm Beach 1001 Okeechobee Blvd.
Jan. 24	9:30 am	Hollywood Crowne Plaza Hollywood 4000 S. Ocean Dr.
Jan. 25	9:30 am	Naples The Hilton Naples 5111 Tamiami Trail N.
Jan. 26	9:30 am	St. Petersburg The Hilton Bayfront 333 1st St. S.
Jan. 27	9:30 am	Sarasota Hyatt Regency Sarasota 1000 Boulevard of the Arts

To reserve your admission, call Kathy at
1-800-267-5956
or
905-765-0265

RSVP required due to Limited Seating.
We will confirm your reservations in advance.

What people are saying...

A select group of Canadians in south Florida have been invited to learn about the latest developments in Estate Planning for Canadians with US assets. The Canadian Estate Planners Inc. will soon be hosting their **20th** annual information seminars on Cross-Border Tax and Estate Planning for Snowbirds.

This year they are again joined by Peter Benson CA,CPA - a popular international Tax Accountant and Doug Markewich - one of Canada's leading Corporate Tax and Estate Planners.

"We find there is a very real need for this information here", said Kenneth Cassis of London, Ont. "The rules are always changing, so many people with significant assets are looking for someone to help them understand how they will be affected. We explain how to make sure the right people get what you intend -with the least costs, tax, and turmoil for the family."

"Successful Canadians are very busy while they are at home. But down here, people seem to have more time to relax and reflect on larger issues such as their family - and the future of their estate." said Michael Evers of Hamilton, Ont. "Every parent worries about equalization, spendthrift heirs, marital stability, taxes etc."

"We try to give everyone an entertaining and educational look at the **serious - but preventable** problems that face Canadian families with substantial American assets." "We talk about the impact this can have on your family. We also show how to reduce or prevent many of these situations with proper planning", added Cassis.

Attention



You are cordially invited to attend an exclusive information seminar

Our **20th**
YEAR
in Florida

Attached you will find an invitation to attend a very interesting meeting being held in Florida this winter. For the past 20 years we have been providing informational Estate Planning Seminars for Canadians who own American assets. This annual series of events has been very popular with Canadians wintering in south Florida.

From Jan. 23rd through the 27th we are hosting our Canadian friends in West Palm Beach, Hollywood, Naples, St. Petersburg, and Sarasota. This year's seminars are entitled "REDUCING USA ESTATE TAX - AND PRESERVING THE MULTI-MILLION DOLLAR ESTATE". The exact times and locations are listed in the Personal Invitation section.

Our four internationally renowned speakers will address many of the tax, estate, and legal problems faced by successful Canadian families. We will discuss how these concerns can be resolved by using creative planning techniques now available under Canadian and USA law. We will explain how recent developments could affect you, with special attention to scheduled changes to USA Estate Tax Regulations.

With over 120 years of combined Estate Planning experience, we understand the joys, the opportunities, and the challenges that success can bring to a family. You can be assured of an enlightening, educational and entertaining presentation.

We will explain the latest strategies for dealing with Cross-Border Estate Planning Issues. You will probably recognize several situations that could apply to your family or company. You should come away with a new level of understanding of the options and strategies now available to you.

You will not be subject to any pressure to buy any product or service. You will only receive additional information following the meeting, if you request that we provide it to you.

There are only 2 requirements in order to attend:

- You must be a Canadian who owns US property (personal or corporate)
- You must phone in advance to reserve your seats

Because of the timely nature of the subject matter, we are often over-booked. We urge you to call early, on the toll-free number to reserve your seats.

We look forward to seeing you soon in Florida.

P.S. If you cannot attend any of the 5 informational seminars, simply complete the attached form and mail it to us. Someone will call to arrange a personal meeting at your convenience.






Kenneth Cassis,
CLU, CH.F.C.
*One of Canada's
Leading Estate
Planners*



Michael Evers,
CFP, CH.F.C.
*Co-Founder of
The Canadian Estate
Planners Inc.*



Peter Benson,
CA, CFP, CPA.
*Canadian & American
Taxation Specialist*



Doug Markewich,
CLU, CHFC, TEP
*Corporate Tax &
Estate Specialist*

REDUCING USA ESTATE TAX - and PRESERVING THE MULTI-MILLION DOLLAR ESTATE

**Limited Seating,
Call To Reserve
1-800-267-5956
OR
905-765-0265**

REQUEST FOR MEETING IN CANADA

Dear Sirs;

I am unable to attend any of the five meetings:

REDUCING USA ESTATE TAX - and PRESERVING THE MULTI-MILLION DOLLAR ESTATE

- Please contact me in Florida for a personal meeting.
- Please contact me in Ontario for a personal meeting.
- I would like information about The Estate Tax Reduction Programme

The Best Time to contact me is :

Name

Florida Telephone

Ontario Telephone

Ontario Address

Email

**Please detach and return to:
The Canadian Estate Planners Inc.
P.O. Box 2138, Caledonia, Ontario,
Canada N3W 2G6**

