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20th
annual

Estate PLANNING symposium

Thursday, November 3, 2011

The Westin New Orleans Canal Place

Magnolia Ballroom

New Orleans, LA 70130

1:30 - 3:30 PM

(Parking: \$5.00 in the Westin garage.)

Our Benefactors and Allied Professionals are Invited to Attend this FREE Twentieth Annual Symposium featuring

→ Today's Opportunities May Be Gone Tomorrow

→ Special Needs

- How to provide for a family member with a disability
- How to maximize resources
- Not jeopardize governmental benefits

We invite our benefactors and allied professionals who advise their clients on estate planning matters to join us for this complimentary, informative afternoon. The Symposium is our way of saying "Thank You" for partnering with our organizations.

Please RSVP by Calling The Catholic Foundation (504-596-3043) or Christian Health Ministries Foundation (504-593-2321) by Wednesday, November 2, 2011.

This symposium is approved for 2.0 hours of CLE, CPE, PACE credits

PRESENTERS

Robert L. Perez JD, CPA



Mr. Perez is a member of the New Orleans, Louisiana law firm Perez, McDaniel & Faust, LLP. He retired from KPMG LLP as a Tax Partner after practicing in the New Orleans office of KPMG for 33 years. He is a member of the American Institute of Certified Public Accountants, the Society of Louisiana Certified Public Accountants, the American Bar Association, and the Louisiana State Bar Association. He serves on the AICPA Committee for Trust, Estate and Gift Taxation. He has been awarded the Personal Financial Specialist (PFS) designation by the AICPA and the Accredited Estate Planner (AEP) designation by the National Association of Estate Planners. He has been awarded the LCPA Outstanding Discussion Leader Award and the 2006 LCPA Distinguished Service Award. Mr. Perez often appears as a speaker at various tax institutes and lectures sponsored by these organizations and KPMG. He received his Bachelor of Business Administration from Loyola University and Juris Doctor from Loyola University Law School.

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Joel A. Mendler



Joel Mendler is admitted to practice law in Louisiana and Alabama and is a member of the Tax and Estate Planning Section of the Sirote & Permutt law firm in Birmingham. Prior to his move to Birmingham after Hurricane Katrina, Mr. Mendler was a member of the New

Orleans law firm of Baldwin & Haspel for 37 years. He graduated from Tulane University and Tulane Law School with honors. Mr. Mendler is a Louisiana Board Certified Tax and Estate Planning Specialist, a fellow of the American College of Trust and Estate Counsel (ACTEC), a member of the Special Needs Alliance (SNA), a member of the National Academy of Elder Law Attorneys (NAELA) and a member of the Birmingham Estate Planning Council. Mr. Mendler has been listed in Best Lawyers in America for over 28 years in Elder Law and Trusts and Estates, is listed in Alabama Super Lawyers in Elder Law and was listed by Worth magazine (12/05) in its selection of the Top 100 Lawyers in Estate Planning.

Mr. Mendler is a past President and Board member of the Advocacy Center, Woldenberg Village and the Jewish Endowment Foundation of New Orleans. He currently serves on the Board of the Birmingham Jewish Foundation and Collat Jewish Family Services in Birmingham. He is a frequent lecturer at Tulane, Loyola, LSU and Alabama Estate Planning Institutes on the subjects of Elder Law and Special Needs Planning and presents at family support groups and parent transition meetings. In 2000, Mr. Mendler chaired a sub-committee of the Louisiana Law Institute which re-wrote Louisiana's interdiction laws.

Mr. Mendler handles all aspects of estate planning and administration, but he focuses much of his practice in assisting clients in providing for a child or family member with disabilities in such a way as to maximize resources and not jeopardize governmental benefits, including the preparation of special needs trusts.