



FOR IMMEDIATE RELEASE:

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WEDU TO HOLD 7TH ANNUAL TAX, ESTATE AND FINANCIAL PLANNING CONTINUING EDUCATION SEMINAR

Jim Davis to Speak on “Process, Politics & Policy in Congress” During WEDU’s 7th Annual Tax, Estate and Financial Planning Seminar



Jim Davis, a member of Holland & Knight's Public Policy & Regulation Group, draws upon his extensive experience in the public sector to provide strategic legal, legislative and regulatory counsel to clients in Florida, the District of Columbia and across the country.

TAMPA, FL; August 1, 2012 – The demands of running a successful financial services practice have never been greater. Investment vehicles such as IRAs and mutual funds have tax and estate planning implications unheard of a generation ago. Financial professionals must keep up to date on the latest changes in the law affecting tax and estate planning, along with fulfilling state requirements for continuing education and professional ethics.

On September 25th, WEDU, west central Florida’s leading Public Broadcasting Station, will host the **7th Annual Tax, Estate and Financial Planning Seminar** for Attorneys, CPA’s, CFP’s and Trust Officers. The seminar will be held in WEDU’s Hough Family Foundation Studio and will include a full breakfast, three (3) hours of Continuing Education for the four professions and a one year subscription to Premiere, WEDU’s monthly magazine and the largest subscription-based magazine in 16 counties. The seminar is presented in partnership with the **Community Foundation of Tampa Bay**, which is dedicated to building a better community through creative philanthropy, vision and leadership,

This year’s presenters include: **Jim Davis**, Holland & Knight, LLP, Washington D.C. and Tampa, who will discuss “*Process, Politics & Policy in Congress: Their Impact on Estate Planning,*” and

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Jeff Baskies, Katz Baskies, LLC, Boca Raton, who will discuss *“Using the \$5 Million Gift Tax Exemption Before It Expires.”*

Geoff Simon, Simon & Associates Wealth Management of Raymond James and host of WEDU’s Suncoast Business Forum, will moderate a panel discussion on *“Providing Meaningful Advice to Clients in Uncertain Times.”* Panelists include **Amelia M. Campbell**, Fowler White Boggs of Tampa, and **Jack W. Kirkland, Jr.** of CBIZ Kirkland, Russ, Murphy & Tapp of Clearwater.

Seminar fee is \$50 per person. Tickets and more information are available online at www.wedu.org/ceseminar.

About WEDU

WEDU is west central Florida’s community-owned Public Broadcasting Station and public media company reaching 16 counties through multiple media platforms including on-air programming and online experiences that broaden horizons, transport and transform and open gateways to new ideas and new worlds. Financially supported by the community, the station offers a wealth of award-winning inspirational, educational and enlightening content over a variety of multi-media platforms. WEDU’s focus on the local community has resulted in the station being regarded as a beacon of trust for men, women and children of every walk of life no matter their age, ethnicity or socio-economic status. WEDU is a treasured community resource - a window to the world for the homebound and a vital educational source for the youngest members of society. WEDU prides itself on its position in the Tampa Bay community as a leader, partner, informed citizen and a member of PBS, the most trusted institution in America.

About the Community Foundation of Tampa Bay

The Community Foundation of Tampa Bay was established in 1990 to build a better community through creative philanthropy, vision, and leadership. It is a nonprofit, tax-exempt organization which administers funds established by individuals, corporations, private foundations and nonprofit organizations to support the charitable needs of the Tampa Bay area. The work of the Foundation is enhanced through its divisions in Greater Sun City Center, Pasco County, Greater St. Petersburg, and Hernando County. The Foundation currently administers approximately \$145 million in assets, placing it in the top 100 of more than 700 community foundations nationwide.

- www.wedu.org -