Learning Objectives

You’ll be able to:

Evaluate fundamental tools in estate planning practice.

Analyze the basics of the federal gift and estate tax system, and learn estate tax planning techniques.

Utilize common retirement asset planning strategies.

Understand the basics of the generation skipping transfer tax.

Reduce tax liability, preserve liquidity and protect assets with tips demonstrated in our succession planning case study.

Continuing Education Credits

Accountants 8.0 CPE Hours
Attorneys 7.0 New York CLE Hours
Certified Financial Planners 8.0 CE Hours

IRS Enrolled Agents & Other Tax Return Preparers 8.0 CE Hours

Review federal tax law and understand its impact on estate planning.

Examine the basics of planning for incapacity and transferring assets at death.

Identify essential retirement asset planning strategies.

Discuss available charitable tax planning vehicles.
Matthew A. Bovino  
Davidson, Dawson & Clark LLP, New Canaan  

Bovino lectures widely on estate planning and related topics, both to the general public and to tax and financial planning professionals. He is a past president of the Estate Planning Council of Fairfield County. While he was initially drawn to trusts and estates by the intellectual challenge of tax law, Mr. Bovino finds counseling clients on how best to protect their families the most rewarding aspect of his practice.

Daniel L. Daniels  
Wiggin & Dana, Greenwich  

Mr. Daniels is a partner in Wiggin and Dana’s Private Client Services Department and a member of the firm’s Executive Committee. He divides his time between the firm’s Greenwich office and New York office. Mr. Daniels focuses his practice on representing business owners, private equity and hedge fund founders, family offices, corporate executives and other wealthy individuals and their families. In addition, he frequently serves as special trust counsel or expert witness in contested divorce proceedings on the subject of the inclusion of irrevocable trust assets in the marital estate. Mr. Daniels is a fellow of the American College of Trust and Estate Counsel and is listed in The Best Lawyers in America. He received a B.A. degree, summa cum laude, from Dartmouth and his J.D. degree, cum laude, from Harvard.

Michael T. Clear  
Wiggin and Dana, Greenwich  

Michael T. Clear is a partner in the firm’s Private Client Services Department. Mr. Clear focuses his practice on estate planning, estate and trust administration, probate litigation and business succession planning. Mr. Clear guides fiduciaries and beneficiaries through estate settlement and trust administration matters. He also assists business owners with succession planning by presenting to family groups on business/estate planning matters and by preparing business entity formation documents, shareholders’ agreements, buy-sell agreements, and grantor-retained annuity and trusts. He also facilitates the sales/transactions of business assets. Mr. Clear is a co-chair of the Probate and Estates Section of the Fairfield County Bar Association, is the president of the Fairfield County Chapter of the Exit Planning Exchange (CT XPE) and is on the Advisory Board of the Center for Family Business. He received his J.D. degree, magna cum laude, from the Quinnipiac University School of Law, where he served as the Executive Managing Editor of the Quinnipiac Probate Law Journal.

Beth Ann Brunalli  
Davidson, Dawson & Clark LLP, New Canaan  

Ms. Brunalli is a partner in the New Canaan, Connecticut, office of Davidson Dawson & Clark LLP. Ms. Brunalli graduated magna cum laude from the University of Notre Dame with a B.A. degree in 2001 and remains an enthusiastic Notre Dame football fan. She earned her J.D. degree from the University of Connecticut School of Law, with a Certificate in Tax Studies, in 2007. Ms. Brunalli was admitted to practice in Connecticut in 2007 and is a member of the Executive Committee of the Estate and Probate Section of the Connecticut Bar Association.

Estate Planning Manual

Included with each registration and written for HalfMoon Education Inc. by Matthew A. Bovino, Daniel L. Daniels, David T. Liebell, Michael T. Clear, and Beth Ann Brunalli.

In this comprehensive, 280-page manual you’ll learn about federal tax law, estate planning, retirement asset planning, asset protection planning, charitable planning, and much more.

Registration

Estate Planning  
White Plains, NY - Thursday, October 26, 2017

How to Register

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( ) I will be attending the live seminar. Single Registrant - $299.00. Three or more registrants from the same company registering at the same time - $279.00 each.

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