Agenda

Tax Law and Its Impact on Planning
Overview of income tax, estate tax and gift tax planning considerations
Portability of exemptions between spouses

Fundamentals of Estate Planning
The basics of planning for incapacity
The basics of asset transfers at death
Basics of estate and gift tax planning
Recognizing ethics issues in estate planning

Gifting Basics
Basics of the federal gift tax system
Gift tax discount planning techniques
Estate freeze techniques

Retirement Asset Planning
Minimum distribution rules
Fixing less-than-perfect beneficiary designations
Common estate planning strategies

Generation Skipping Transfer Tax (GSTT) Planning
Defining terms and assigning generations
Taxable transfers and exemptions
Inclusion ratio
Application of GSTT to trusts

Charitable Planning
Charitable tax planning vehicles

Advanced Gifting Strategies and Testamentary Planning
Advanced trusts, annuities and other instruments
Testamentary tax planning for married couples
Advanced generation-skipping and estate tax reduction planning

Business Succession Planning
Living buy-sell agreements
Using family limited partnerships
Valuing business and partnership interests

Trustee Selection and Asset Protection Planning
The role of the trustee
Factors for trustee selection
Integrating asset protection with estate planning

Ethical Considerations in Estate Planning

Learning Objectives

You'll be able to:

Learn about income, estate, and gift taxes and their impact on estate planning.

Explore the basics of planning for incapacity and planning for asset transfers at death.

Discuss retirement asset planning, GSTT planning and charitable planning.

Examine business succession planning, including the use of buy-sell agreements.

Review ethical considerations in estate planning.

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Seminar Information
Crowne Plaza White Plains
66 Hale Avenue
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Tuition
$299 for individual registration
$279 for three or more registrants from the same company at the same time.

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Estate Planning
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