Advanced Estate Planning

July 18, 2013
National Business Institute

For more information on this event, including registration, click here.

Estate planning practice is changing, and the tools you may have used successfully for years may no longer be as effective as they once were. Are you confident in your ability to adapt to the latest tax regulations and judicial rulemaking? This practical guide will give you the skills you need to draft and troubleshoot even the most complex trusts, and ensure that all elements of a client's estate work well together. Get two full days of advanced estate planning training and sample documents from experienced attorney faculty.

- Review sample IRA trust and refine your drafting skills.
- Clarify current tax regulations and IRS enforcement efforts to ensure compliance.
- Find out how the timing of the transfer into a trust affects the client's tax liability.
- Get the latest in judicial treatment of self-settled trusts to determine when one may be a good option.
- Take a detailed look at the key provisions of intentionally defective grantor trusts to maximize their effectiveness.
- Better understand the use of closely-held businesses in estate planning.
- Help clients plan for disability and long-term care, without affecting benefits eligibility and the end estate plan.
- Learn how to draft and fund special needs trusts.
- Hear experienced faculty share their tips for protecting client confidentiality, during and after the client's life.

Location:

Holiday Inn Cherry Hill
2175 Marlton Pike
Cherry Hill, NJ 08002

Who Should Attend:
This advanced-level seminar is designed for attorneys. It will also benefit estate and financial planners, trust officers, accounting and tax professionals, and paralegals.

Course Content
DAY 1

- Estate Planning with Retirement Accounts and Life Insurance

- Trust Funding and Execution: Risks and Traps
- Using QTIPs to Protect Propertied Spouse and Children from Prior Marriages
- Self-Settled Trusts: Friend or Foe?
- Sample QPRT (Qualified Personal Residence Trust) Review
- Intentionally Defective Trusts in Detail

DAY 2

- Generation-Skipping Planning - Presented by Justin H. Brown
- Tax Regulations Update: Federal and State
- LLCs Plus: Mastering the Use of Closely-Held Businesses in Estate Planning
- Planning for Disability and Long-Term Care
- Legal Ethics - Presented by Justin H. Brown

Continuing Education Credit

Credit Hrs State
CLE 14.40 - NJ*
CLE 14.00 - NY*
CLE 12.00 - PA*

Financial Planners – Financial Planners: 14.00

International Association for Continuing Education Training – IACET: 1.20

National Association of State Boards of Accountancy – CPE for Accountants: 14.00 *

Professional Achievement in Continuing Education – PACE: 14.00 *

* denotes specialty credits