

Trusts 101

December 19, 2014

National Business Institute

Provide your clients with the full spectrum of wealth preservation options. When assessing complex information, it often helps to break items into basic building blocks. The same approach can be successful when dealing with asset protection. Be prepared for specific challenges associated with various types of trusts by understanding their unique characteristics. Our intensive full-day primer will provide you with a comprehensive overview of the wide variety of trusts available.

- Determine what role the settlor will play by weighing the pros and cons of establishing an irrevocable trust over a revocable trust.
- Learn what not to do when selecting and drafting a revocable trust to avoid common mistakes.
- Learn how to choose the most beneficial vehicle for preserving your client's wealth: understand the purpose behind the various types of irrevocable trusts.
- Explore the powers and duties of personal representatives in irrevocable trusts.
- Save money on taxes with effective use of defective trusts.
- Learn why it's important to know when to file the tax return for grantor trusts.
- Determine whether a client qualifies as a beneficiary of a special needs trust.
- Don't reinvent the wheel - modify our sample trust documents and use our drafting tips to create airtight trusts.

Who Should Attend

This basic level seminar is designed for the professionals involved in creating, administering and terminating trusts:

- Attorneys
- Accountants and CPAs
- Trust Officers
- Financial Planners
- Tax Preparers
- Paralegals

Time:

8:30 AM - 4:40 PM

Continued

Location:

Atlantic City, NJ

Speakers:

Justin Brown, Flaster Greenberg PC

Jason Henbest, Henbest Law Group, LLC

Ethan Ordog, Begley Law Group, P.C.

For more information or to register, visit <http://www.nbi-sems.com/>.