



GS 815 Advanced Estate Planning Webinar

The Times They Are A'Changing

As you well know, estate planning is in transition. Now is the time to recalibrate your approach to the field. It is time to go beyond traditional asset centric planning and incorporate important family centric elements.

GS 815 Advanced Estate Planning -- UPDATED

This course provides an in-depth look at the techniques of estate planning under the new law. Drawing on NAEPC's own ongoing research, the course teaches the essential skills of purposeful planning and collaboration needed to serve multi-generational families of wealth.

The course also includes the traditional estate planning topics. Methods of property transfer including probate, contractual beneficiary designations, trusts, and operation of law are discussed. The methods and planning for lifetime gifts are an important component of the course. The topics range from basic gifts to sophisticated transfers involving life insurance, partial interest trusts, family limited partnerships, and generation-skipping transfer tax implications. The estate-planning value of charitable giving techniques will be a significant component of the course. A thorough discussion of the estate planning implications of retirement plans and IRAs is included. The types of closely held business entities and methods of transferring family businesses will be discussed. Finally, the course will cover special estate planning issues concerning unmarried couples and planning for incapacity.

Learning Objectives

This course enables tax, legal and financial professionals to:

- Elicit client purpose, vision, values and goals.
- Team with others around the planning table to accomplish client goals
- Understand the methods of property transfer to assist a client in determining the appropriateness of a current scenario.
- Understand and assist in the planning of lifetime gifts for a high net worth client.
- Learn the terminology and determine the appropriateness of charitable gifts in the client's estate plan.
- Be able to plan to use life insurance in the client's estate plan.
- Understand the marital deduction and learn the complex terminology associated with planning transfers to a surviving spouse.
- Take an in-depth analysis of the choices available to a client with large balances in a qualified retirement plan or IRA.
- Understand the choices available for business ownership and provide a range of choices for the disposition of a closely held business interest.
- Understand the implications for planning for nontraditional families and planning for the incapacity of a client.

Delivery: Webinars Taught by Tim Belber, JD, AEP®

Tim focuses his practice on helping self-made families align the power of their financial assets with their long-term goals for flourishing as individuals and families across generations.

With a business degree from the Wharton School at the University of Pennsylvania and a law degree at night from Seton Hall University, his commitment to law school was led by the belief that it would make him a better advisor to established families.

Tim speaks frequently on the subject of incorporating ethics and values into long term financial and estate plans, and is an accomplished author in this field.

Wednesdays, February 13 through April 17, 2019

2:00pm-5:00pm EST

***For more information please contact Elaine Gulezian at 610-526-1479
or email Elaine.gulezian@theamericancollege.edu***
