

## Webcast and Seminar Acronym: EP16

**Title: 2016 Estate And Wealth Planning Update**

**Recommended**

**CPE Hours: 6 CPE Credit Hours.**

**Highlights:**

Come join Larry Stein as he discusses selected recent developments that impact your tax, estate planning, and eldercare clients. Larry will cover many developments that will impact your wealth planning techniques.

**Learning Objectives:**

Upon the successful completion of this CPE Event, the participants will be able to explain **selected** key estate and wealth planning developments that impact their wealthy, high-income clients.

**Major Topics:**

- Incapacity Planning; Durable Power Of Attorney.
- Digital Assets - Estate Planning; Letter Of Instructions.
- Business Succession Planning - Proactive Moves.
- Recent Case Law, Regulations, And Administrative (IRS) Pronouncements.
- **Estate Of Purdue** - Family LLCs, Discounts, Crummey Powers, And **Graegin** Loans; Family Partnerships - Selected Developments.
- Valuation - Estate Of Pulling.
- No Estate Tax Closing Letters Unless Requested.
- Final Marital Portability Regulations.
- Stepped-Up Basis - Developments.
- IRS Form 8971 - IRC 1014(f) And 6035 Developments.
- Estate Of William Davidson - Post-Case Developments.

- IRC 642(c) Cases; Charitable Planning Developments; Impact Of The PATH Tax Law.
- IRA Estate Planning Developments.
- Intentionally Defective Grantor Trusts (IDGTs) - The **Woelbing** Cases.
- Trust Design; Decantings.
- Trust Protectors.
- Private Trust Companies.
- Adjusting Estate Plans.
- Spousal Access Lifetime Trusts (SLATs).
- Selected FATCA And FBAR Developments.
- The Net Investment Income Tax (NIIT).
- Gift Splitting.
- Selected Gift Tax Developments; The **Marshall** Case.
- Family Settlement Agreements - The **Redstone** Case.
- Crummey Withdrawal Rights; The **Mikel** Case.
- Disclaimers.
- Net, Net Gifts - The **Steinberg** Case.
- ABLE Accounts.
- Eldercare - Trends.
- Social Security And Medicare Changes.
- Asset Protection Developments.
- Post-Obergefell Developments.
- Selected Florida Developments.

**Designed For:** CPAs with at least six (6) years of experience. You must have a basic knowledge of estate planning and federal taxation.

**NASBA Fields Of Study:** Taxes.

**Level:** Update.

**Presentation Method:** Live Lecture With Questions And Answers.

**Recommended CPE Credit Hours:** 6 CPE credit hours.

**Advanced Preparation:** Basic knowledge of estate planning and federal taxation.

**Prerequisites:** Basic knowledge of estate planning and federal taxation.

**NOTE:** If you have any questions, please email Larry Stein at taxman532@hotmail.com.

**Texas Registration:** 009838

“I have registered with the Texas State Board of Public Accountancy as a CPE sponsor. This registration does not constitute an endorsement by the Board as to the quality of my CPE program.”

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