2024 Estate Planning Teleconference

January 23, 2024:
Spousal Lifetime Access Trusts – A Fleeting Opportunity

February 20, 2024:
State Income Tax Issues with Trusts

March 19, 2024:
Deep Dive into Disclaimers

April 23, 2024:
Shelter from the Storm – Anticipating and Avoiding Breach of Fiduciary Duty Claims

May 21, 2024:
Marital Agreements from A to Z

June 18, 2024:
Ethics Issues in a Contemporary Estate Planning Practice

July 23, 2024:
Nuts and Bolts of Trust Terminations

August 20, 2024:
Addressing the Estate Planning Needs of Modern-Day Clients

September 17, 2024:
Multi-Faceted Conflicts Among Trust Beneficiaries, Trustees, the IRS and the Courts

October 22, 2024:
Durable Powers of Attorney – An Essential Estate Planning Component

November 12, 2024:
Repair or Replace? The Deficient Trustee

December 10, 2024:
Application of Legal Ethics Rules When There's No Attorney-Client Relationship

Register

Invite local attorneys, CPAs, and key referral sources for a networking session!
Consider hosting these sessions in your office or a suitable venue of your choice. By participating, you and your associates will benefit from in-depth discussions on contemporary planning approaches, techniques, and current tax rulings relevant to high-net-worth clients and their families.

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