The Best Estate and Financial Planning Topics of 2022

The experienced practitioner always looks to learn the latest issues and techniques in the arena of estate and financial planning. This course presents—in a day—the best of those issues and techniques.

OBJECTIVE:

At the end of this course, you will be able to:

- Recognize the latest issues and best techniques in estate and financial planning

HIGHLIGHTS:

- The uncertainty of estate and gift tax planning
- Common mistakes made by clients in estate and financial planning
- The modern era of domicile—related issues in tax, financial, and estate planning
- Issues in charitable planning
- The proper use of split-interest trusts
- Sophisticated insurance concepts
- The need for proper IRA distribution planning
- Special planning issues for the older client
- "What is next?"

DESIGNED FOR: CPAs, EAs, attorneys, finance professionals, financial planners, insurance agents, and bankers

RECOMMENDED CPE: 8 credit hours

PREREQUISITE: A basic understanding of the underlying concepts of estate and financial planning

EVENT ACRONYM: BEST

LEVEL: Intermediate

FIELD OF STUDY: Taxes