

Asset Protection Strategies

It has become exceedingly difficult for business people, professionals, and other individuals to conduct their affairs without exposure to the hazards of litigation and creditors. There are many methods by which individuals with significant assets at risk can legitimately protect their personal net worth. This course is designed to provide the participant an understanding of the techniques employed in protecting assets.

OBJECTIVE:

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

- Recognize methods used to protect and preserve a client's wealth during the client's lifetime.

HIGHLIGHTS:

- Introduction to asset protection planning
- Non-grantor irrevocable trusts
- Domestic asset protection trusts
- Foreign trusts
- Pension plans and IRAs
- Family partnerships
- Dynasty trusts
- Private annuities and self-canceling installment notes

DESIGNED FOR: CPAs, EAs, attorneys, and financial planners

RECOMMENDED CPE: 8 credit hours

PREREQUISITE: None

EVENT ACRONYM: APSX

LEVEL: Basic

FIELD OF STUDY: Taxes