LEIMBERG Information Services, Inc.

A Leimberg Information Services Webinar Presentation

OLD TRUSTS, NEW TRICKS. NEW TRUST, ESTATE AND TAX PLANNING STRATEGIES AFTER TAX REFORM

The new tax laws change not only the playing field and strategies that will apply to estate and trust clients who are not super wealthy, but also several key trust planning rules and the tax laws, metrics planning wisdom that will apply to Electing Small Business Trusts, Complex Trusts, Charitable Lead Annuity Trusts, Homestead Trust Planning and a host of other considerations beyond what the next tax law says.

Join Marty and Alan for this interesting and useful discussion of what to do with present structures that may no longer be needed, and how to adapt existing arrangements and client situations to new opportunities and traps for the unwary that must be considered.

This presentation will assume that the viewer is generally familiar with the new tax law, and wishes to make planning opportunities and appropriate adjustments available to colleagues and clients. Over 20 useful and client friendly charts and key clauses will be included.

To register, please click HERE

Martin Shenkman

Alan Gassman

Thursday, March 22nd, 2018, 3:00 P.M.—4:00 P.M. EST

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There are no professional advancement credits (CPE, CLE, etc.) offered for viewing this webinar.