Curriculum Vitae of
ALAN S. GASSMAN, JD, LL.M., AEP® (Distinguished)

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PROFESSIONAL STATUS

Alan Gassman is the Senior Partner and founding member of Gassman, Crotty & Denicolo, P.A., a six lawyer AV rated Clearwater, Florida law firm that has provided estate and estate tax planning, tax, and business representation since 1987. Partners Kenneth J. Crotty, Christopher J. Denicolo, and Brandon Ketron each have post Master's degrees in estate planning or taxation and have co-published numerous articles and conference materials with Mr. Gassman.

EDUCATION

LL.M. in Taxation (Post-law Master's Degree), (1983)
University of Florida
Gainesville, Florida

JD, with Honors, (1982)
University of Florida
Gainesville, Florida

B.A., with Honors, in Business Administration and Accounting, (1979)
Rollins College
Winter Park, Florida

EDUCATIONAL ACTIVITIES

Adjunct Professor of Law, Stetson University College of Law - "Law Practice Management and Professional Mastery" - 2022 Summer Semester.

Past Co-Chairman, The Florida Bar Tax Section Annual Wealth Protection Seminar, presented each year (now twice annually) by The Florida Bar – over more than 20 consecutive years.

Past Co-Chairman, The Florida Bar Tax Section/Health Law Section Representing the Physician, presented each January for 17 years by The Florida Bar.

Advisory Board – Notre Dame Tax & Estate Planning Institute (2014 to present).

Advisory Board – Ave Maria School of Law Annual Estate Planning Conference (2014 to present).

Advisory Board – All Children's Hospital/Johns Hopkins Medicine Estate, Tax, Legal, & Financial Planning Conference – Founding Advisory Board Member – have served continuously since 1998.

Council Member on the NAEPC Diversity, Equity and Inclusion Committee.

Annual Presenter on Taxation, The Florida Bar/Health Law Section Annual Advanced Seminar/Board Certification Review Course (2013 through 2015).

CERTIFICATIONS, RECOGNITIONS & MARTINDALE-HUBBELL RATING

Bloomberg Tax - Tax Contributor of the Year Award Recipient for 2022

CPAacademy.org - Top Presenter for 2022

Estate Planning Hall of Fame Class of 2021, National Association of Estate Planners & Council (NAEPC).

Accredited Estate Planner Designation from the National Association of Estate Planners & Council (NAEPC).

Board Certified Estate Planning and Administration Lawyer, Florida Bar.

AV rating in Martindale-Hubbell Directories.

Listed in Best Lawyers of America.

Listed in Florida Super Lawyers.

PUBLICATIONS, PRESENTATIONS & SPECIAL PROJECTS

Author and co-author of multiple published books on estate and tax planning, wealth protection, and associated topics.

Presenter for lawyer and CPA continuing education conferences and webinars for multiple organizations including Notre Dame Tax Institute, Bloomberg BNA Tax & Accounting, American Bar Association – American Law Institute, Florida Institute of Certified Public Accountants, Accounting Today Magazine, AICPA, Leimberg Information Services and others.

Lecturer on Florida Estate, Trust, Tax and Related Planning, New Jersey Bar Association, presented 2013, 2014, 2015, 2017, 2018, 2019.

Former member of Board of Advisors of the Journal of Asset Protection, which was published by Matthew Bender as a quarterly journal.

Creator, writer and presenter for six-hour continuing education program for law students and new lawyers called Professional Acceleration Workshop presented by request multiple times at the University of Florida LL.M in Taxation Program, Stetson University College of Law and Ave Maria School of Law.

Featured in University Of Florida College of Law Legacies Newsletter & Advisor Network "Ask the Expert" Interview by Paul Caspersen, Assistant Vice President and Sr. Philanthropic Advisor at UF Law in October 2021.

Has written and co-authored several articles featured in the NAEPC Journal of Estate & Tax Planning.

Co-creator of the JEST Joint Revocable Trust System, as profiled in the October and November 2013 Issues of Estate Planning Magazine and multiple subsequent commentaries by other authors.

Creator of the Self-Cancelling Grantor Retained Annuity Trust (SCGRAT) profiled in Leimberg Information Services, Inc. Estate Planning Newsletter – Archive Message #2230.

Co-creator of the EstateView Estate Tax Planning Software developed with Professor Jerome Hesch as presented at multiple estate and tax planning conferences and programs. As profiled in the January 2015 edition of the ABA Property & Property Magazine, Real Property, Trust and Estate Law (RPTE) Section.

Guest lecturer on estate planning at Florida State University College of Law.

Creator and author – *The Alan Gassman Channel* on InterActive Legal, 2016-2017 and *Alan Gassman YouTube Channel* established in Aug 2012.

BOOKS AUTHORED OR CO-AUTHORED

The Advisor's Guide To Charitable Giving, Organizations, and Creative Structuring, National Institute for Charitable Education, 2022.

The Employee Retention Credit Guide: Includes IRS Forms, Instructions, and all Statutes, Regulations, and Pronouncements through August 4, 2021**,** Haddon Hall Publishing and Leimberg Information Services.

What Estate Planners (and Others) Need to Know About Bankruptcy, Haddon Hall Publishing, 2018.

What CPAs And Other Advisors Need To Know About Bankruptcy**,** Haddon Hall Publishing, July 14, 2021.

The Section 199A (and 1202) Handbook: Updated 2019 Edition**,** Haddon Hall Publishing and Leimberg Information Services, 2019.

Gassman & Markham on Florida and Federal Asset Protection Law, Bloomberg BNA Tax & Accounting, Estate, Gift and Trust included in portfolio system, 2018 and updated periodically.

Estate Tax Planning in 2011 and 2012**,** Bloomberg BNA Tax & Accounting, 2011.

Estate Tax Planning in 2011 and 2012 Recent Developments and 2012 Supplement**,** Bloomberg BNA Tax & Accounting, 2012.

Grow Your Medical Practice and Get Your Life Back with co-authors David Finkel and Pariksith Singh, M.D., Pradstreet and Sons, a division of New Edge Financial, LLC, 2018

The Legal Guide to NFA Firearms and Gun Trusts with co-authors Lee-Ford Tritt, Jonathan Blattmachr, and others, Haddon Hall Publishing, 2016

Florida Law for Tax, Business and Financial Planning Advisors, Haddon Hall Publishing, 2013.

8 Steps To a Proper Florida Trust & Estate Plan, Haddon Hall Publishing, 2013.

The Florida Power of Attorney & Incapacity Planning Guide, Haddon Hall Publishing, 2013.

The Essential Planning Guide to the 2013 Income & Estate Tax Increases, Haddon Hall Publishing, 2012.

Creditor Protection for Florida Physicians**,** Haddon Hall Publishing, 2012.

A Practical Guide to Kickback and Self-Referral Laws for Florida Physicians, Haddon Hall Publishing, 2014.

Planning for Ownership and Inheritance of Pension and IRA Accounts, Hadden Hall Publishing, 2017 (last update).

The Florida Physician Advertising Handbook, Haddon Hall Publishing, 2012.

The Advisor's Guide to Counseling Same Sex Couples, Haddon Hall Publishing, 2014.

Community Property Planning in Non-Community Property States & Understanding the Florida Community Property Trust Act - Opportunities, Developments, and Traps for the Unwary, Stetson Business Law Review, Vol. 2, No. 2, Spring 2024.

BLOOMBERG TAX MANAGEMENT ESTATES, GIFTS, AND TRUST JOURNAL CONTRIBUTOR

***The 501(c)(4) Strategy*, 48 Tax Mgmt. Ests., Gifts & Trs. J. No. 1** (Jan. 12, 2023).

Planning for the Affluent Charitable Client, Estates, Gifts & Trusts Journal (BNA) (11/10/2021).

Practical Strategies for Avoiding Estate and Trust Litigation: Proactive Thinking and Communications Can Make a Big Difference, Estates, Gifts & Trusts Journal (BNA) (09/09/2021).

SLAT-OPEDIA: Considering All Options and a Client-Friendly Letter, Estates, Gifts & Trusts Journal (BNA) (05/13/2021).

The 501(c)(6) Noncompliance Problem – How Many Industry and Professional Organizations Are Out of Compliance and Should Not Have Qualified for PPP Loans, Tax Management Memorandum (BNA) (04/19/2021).

IRA and Pension Law Rule Changes and Practical Planning Under the CARES Act, Estates, Gifts & Trusts Journal (BNA) (05/14/2020).

Family Offices Allow (Some) Taxpayers to Deduct Investment Related Expenses, Estates, Gifts & Trusts Journal (BNA) (03/12/2020).

2018 Tax Developments for Estates, Gifts, and Trusts (03/11/2020).

Asset Protection Update — 2019 in Review, Financial Planning Journal (BNA) (01/21/2020).

2018 Tax Developments for Estates, Gifts, and Trusts: The Bloomberg Tax Perspective With Expert Commentary From the Estates, Gifts and Trusts Advisory Board (11/07/2019).

Florida Traps for the Unwary: AKA Runnin' Down a Dream, Estates, Gifts & Trusts Journal (BNA) (01/10/2019).

Ten (Plus) Questions to Ask About a Client's Life Insurance and Planning — What Every Estate Planning Or Tax Planning Advisor Should Know, Estates, Gifts & Trusts Journal (BNA) (11/12/2015).

Florida Planning Mistakes and Missed Opportunities — 2015: The Most Common Florida Planning Mistakes; New Laws, Old Laws, Common Errors And Misconceptions, Estates, Gifts & Trusts Journal (BNA) (01/08/2015).

Way Down Upon the Bifani River: Setting Aside Fraudulent Transfer Into Florida Homesteads, Estates, Gifts & Trusts Journal (BNA) (01/08/2015).

Tea for Two, and Two for TBE? Why Many Same-Gender Couples Living in Non-recognition States Should Title Their Assets as Tenants by the Entireties, Estates, Gifts & Trusts Journal (BNA) (07/10/2014).

The Stepped-Up Basis Conversation, Financial Planning Journal (BNA) (01/21/2014).

Part III What You Need to Know About Florida Law to Advise Your Clients Who Live Here, Estates, Gifts & Trusts Journal (BNA) (11/14/2013).

Part II What You Need to Know About Florida Law to Advise Your Clients Who Live Here, Estates, Gifts & Trusts Journal (BNA) (05/09/2013).

What You Need to Know About Florida Law to Advise Your Clients Who Live Here, Estates, Gifts & Trusts Journal (BNA) (01/10/2013).

Safe Trust Guide — Why Your Family Needs a Safe Trust and What to Do to Implement One by the End of 2012 (the Spouse and Family Exempt ("Safe") Trust), Financial Planning Journal (BNA) (06/19/2012).

Practitioner Says Estate Tax Planning Needs Flexibility, Consideration of Possible Changes, Tax Management Weekly Report (BNA) (07/18/2011).

Florida Supreme Court Surprises Practitioners With LLC Charging Order Opinion, Estates, Gifts & Trusts Journal (BNA) (09/09/2010).

Unconventional Uses of 529 Plans Should Not Be Ignored By Taxpayers and Their Advisors, Bloomberg BNA Tax & Accounting, (03/2010).

Don't Overlook the Benefits – Tax and Otherwise of Private Operating Foundations, Bloomberg BNA Tax & Accounting, (08/2009).

WEALTHMANAGEMENT.COM CONTRIBUTOR

"New PPP Transfer Rules May Limit Use of Estate - Planning Strategies", with Brandon L. Ketron, Wealth Management / Wealth Planning/Estate Planning, November 2, 2020.

"Is the TEA POT Trust Right for Your Clients?", with John N. Beck, Wealth Management / Wealth Planning/Estate Planning, March 25, 2020.

"The Shifting Safe Harbor Under IRC Section 199A", Wealth Management / Wealth Planning/High Net Worth, October 8, 2019.

“Employee vs. Independent Contractor”, with Martin S. Shenkman, Wealth Management / Wealth Planning/High Net Worth, April 2, 2019.

“IRS Issues Final Rgs on IRC Section 199A, What Trust Advisors Need to Know”, with John N. Beck and Brandon L. Ketron, Wealth Management / Wealth Planning/Estate Planning, January 30, 2019.

“IRS Provides Advice on 199A de Minimis Thresholds”, with Brandon L. Ketron, Wealth Management / Wealth Planning/High Net Worth, November 21, 2018.

“How Long Can Your Tax Returns Haunt You?”, with Mitchell Horowitz, Wealth Management / Wealth Planning/High Net Worth, October 10, 2018.

“How Tax Law Changes Affect Value of Home Ownership”, with Martin M. Shenkman, Wealth Management / Wealth Planning/High Net Worth, October 9, 2018.

“Send Client Letter About Self-Settled DAPTs Post Wacker”, with Martin M. Shenkman, Wealth Management / Wealth Planning/Estate Planning, April 5, 2018.

The Estate Planner’s Guide to the Right to Die”, with Sydney Smith, Wealth Management / Wealth Planning, September 25, 2013.

ARTICLES FEATURED IN THE NATIONAL ASSOCIATION OF ESTATE PLANNERS & COUNCILS (NAEPC) JOURNAL OF ESTATE & TAX PLANNING

Issue 38 What Part of Disregarded Did You Inadvertently Disregard (PDF)
This article discusses pending tax law changes with disregarded trusts and options to consider for clients. Reproduced courtesy of Leimberg Information Services, Inc. (LISI)
Authors: Alan S. Gassman, JD, LL.M. (taxation), AEP® (Distinguished) and Brandon L. Ketron, JD, LL.M.

Issue 38 Using the Florida Irrevocable Community Property Trust to Protect an Elderly Couple from Abuse (PDF)
The authors discuss how a new FL trust law can be used to protect the elderly. Reproduced courtesy of Leimberg Information Services, Inc. (LISI)
Authors: Alan S. Gassman, JD, LL.M. (taxation), AEP® (Distinguished), Jonathan G. Blattmachr, Esq., AEP® (Distinguished), and Brock Exline

Issue 35 10-Aug-20 Alan S. Gassman, Jerome B. Hesch & Martin B. Shenkman on the Biden 2-Step for Wealthy Families: Why Affluent Families Should Immediately Sell Assets to Irrevocable Trusts for Promissory Notes Before

Year-End and Forgive the Notes If Joe Biden Is Elected, A/K/A What You May Not Know About Valuing Promissory Notes and Using Lifetime Q-Tip Trusts

Issue 30 19-Mar-18 Jonathan Blattmachr, Matthew Blattmachr, Martin Shenkman & Alan Gassman on Toni 1 Trust v. Wacker - Reports of the Death of DAPTs for NonDAPT Residents Is Exaggerated

Issue 29 Feb 01, 2018 Sandra D. Glazier, Martin M. Shenkman & Alan Gassman on DAPTs & Klabacka - At the Intersection of Estate Planning and Family Law

Issue 26 May, 2017 The Asset Protection Planning Continuum – Practical Steps for Estate Planning Lawyers and Other Professionals
By: Martin M. Shenkman, Esq. and Alan S. Gassman, Esq.

Alan Gassman referenced by other Authors in Issue 21
PUTTING IT ALL TOGETHER: SOME OF THE BEST ESTATE PLANNING STRATEGIES WE SEE IN THE NEW FRONTIER THAT REDUCE BOTH INCOME AND ESTATE TAXES© S. Stacy Eastland, Houston, Texas

Alan Gassman referenced by other Authors in Issue 31 PUTTING IT ON & TAKING IT OFF: MANAGING TAX BASIS TODAY (FOR TOMORROW) Paul S. Lee, J.D., LL.M. Global Fiduciary Strategist, The Northern Trust Company, New York, NY

Alan Gassman referenced by other Authors in Issue 28 Martin M. Shenkman's Meeting Notes from Heckerling 2018 - Day 2 Morning & Afternoon Notes

Alan Gassman referenced by other Authors in Issue 34 A Noteworthy Dichotomy: Valuation of Intrafamily Notes for Transfer Tax Purposes, By Michael S. Strauss and Jerome M. Hesch*

Alan Gassman referenced by other Authors in Issue 34 Heckerling Musings 2020 and Estate Planning Current Developments
March 2020

Alan Gassman referenced by other Authors in Issue 28 Heckerling Musings 2018 and Estate Planning Current Developments
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April 2019

Alan Gassman referenced by other Authors in Issue 26 Estate Planning Current Developments and Hot Topics
May 2017

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SECURE 2.0 Chart By Alan Gassman and Peter Farrell 13-Jan-2023

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IRS Notice 2022-53: The Service Announces No Penalties for Failure to Make 2020 or 2021 RMDs in Certain Circumstances When the New 10-Year Rule Applies Under the Proposed Regulations, and Final Regulations Regarding RMDs Will Not Apply Until 2023 By Christopher Denicolo, Alan Gassman & Brandon Ketron 10-Oct-2022

The Death of Havoco Has Been Greatly Exaggerated, Last Minute Transfers to Florida Homestead to Avoid Creditors are Alive and Well By Alan Gassman and Wesley Dickson 12-Sept-2022

Kearney Construction Company, LLC v. Travelers Casualty and Surety Company of America: Governor Vetoes Kearney Patch Bill, Blanket Lien Agreements May Obliterate IRAs By Alan Gassman, Michael Markham, Peter Farrell, Brock Exline & Samuel Craig 16-Aug-2022

What Legal Advisors Need to Know About the Recent Gun Law Changes By Jonathan Blattmachr and Alan Gassman 27-June-2022

New SLAT Legislation Opens a New Asset Protection Opportunities for Florida Residents By Christopher Denicolo, Alan Gassman and Brock Exline 24-May-2022

IRS Clawback Proposed Regulations Put a Tiger in the IRS's Tank By Brandon Ketron and Alan Gassman 29-Apr-2022

The Reports of the Death of the Charging Order Are Greatly Exaggerated, a/k/a Don't Think Twice, Your LLC is Alright By Alan Gassman and Wesley Dickson 28-Apr-2022

Tenancy by the Entireties Trust Confusion By Alan Gassman and Wesley Dickson 26-Apr-2022

Trust Protectors, Reformation, Decanting, and Other Trust Modification Techniques to Facilitate Flexibility for IRA/Pension Plan Owners Under the Proposed SECURE Regulations By Brandon Ketron, Christopher Denicolo and Alan Gassman 21-Mar-2022

Powers of Appointment, An Amazing Planning Tool Under the New IRA Stretch Trust Regulations By Brandon Ketron and Alan Gassman 5-Apr-2022

Seeing Through the Proposed Regulations on IRA and Pension Distributions, Good News (Mostly) for See-Through Trusts By Brandon Ketron and Alan Gassman 21-Mar-2022

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A Small(Dino) Christmas Carol By Alan Gassman and Matthew Giovenco 24-Dec-2021

January 1 Deadline for Physician Compensation Plan Amendments to Comply with Stark Law Changes & How this Works for Group Medical Practices By Alan Gassman & Irine Korte 22-Dec-2021

What to Do with the Promissory Note Owed to the Grantor of an Intentionally Defective Grantor Trust, and Planning Techniques that Apply to Notes and Other Assets: Forgive or Assign, Keep in Place or Alter the Arrangement (PART 2 of 2) By Brandon Ketron and Alan Gassman 21-Dec-2021

What to Do with the Promissory Note Owed to the Grantor of an Intentionally Defective Grantor Trust, and Planning Techniques that Apply to Notes and Other Assets: Forgive or Assign, Keep in Place or Alter the Arrangement (PART 1 of 2) By Brandon Ketron and Alan Gassman 20-Dec-2021

What Biden and the White House Said and Didn't Say About the Estate Tax Laws Last Week And What to Do By Brandon Ketron, Martin Shenkman, Alan Gassman and Wesley Dickson 02-Nov-2021

Florida's 10% Cap on Non-homestead Property Tax Assessment Increases/ a New Hazard for Florida Planners. 29-Oct-21

Relying Upon Erroneous IRS Written Guidance / A Single Step in the Right Direction "Taxpayers Rely on IRS Guidance at Their Own Peril" 05-Oct-21

Steve Leimberg's Estate Planning Newsletter Alan Gassman & Brandon Ketron: Possible Estate Tax Law Changes - What To Do Now 20-Sep-21

Florida Bankruptcy Court Finds Joint Revocable Trust Does Not Qualify as a Tenancy by the Entireties Asset By: Alan S. Gassman, Esq., Grace Paul, and Brock Exline

Alan Gassman & Chris Denicolo - The Florida Community Property Trust: Rethinking Client Trust Logistics with a New Powerful Catalyst

Steve Leimberg's Estate Planning Newsletter Issue:2893 2021-07-08

Alan Gassman, Brandon Ketron and Grace Paul: HHS Provider Relief Rules & Deadlines Updated for the HHS's June 11, 2021 Announcement - June 30th Deadline Is Here
Steve Leimberg's Business Entities Newsletter Issue:232   2021-06-29

Alan Gassman & Brandon Ketron: Revenue Procedure 2021-20 Helps Fiscal Year PPP Borrowers & Gives Hints as to Probable Treatment of Calendar Year Borrowers
Steve Leimberg's Business Entities Newsletter Issue:227 2021-04-05

Alan Gassman & Brandon Ketron: Potential Estate and Gift Tax Bill Could Reduce Exemption to a Fraction of Its Current Amount - What Is at Stake
Steve Leimberg's Estate Planning 2873 2021-03-29

Alan Gassman & Brandon Ketron: What Advisors Need to Know About the Restaurant Revitalization Fund
Steve Leimberg's Business Entities 225 2021-03-22

Alan Gassman and Brandon Ketron: SBA PPP Pronouncement Provides Higher Loans and Other Changes for Proprietors and Independent Contractors Steve Leimberg's Business Entities 224 2021-03-10

Alan Gassman and Brandon Ketron on Notice 2021-20: March 1st IRS Notice Provides Essential Guidance and Safe Harbors for the Employee Retention Credit
Steve Leimberg's Business Entities 223 2021-03-09

Steven M. Hogan, Bob Pierce, Alan S. Gassman and Peter Donovan: The Florida Documentary Stamp Tax and Revocable Living Trusts - A Swamp of Confusion for the Department of Revenue
Steve Leimberg's Estate Planning 2864 2021-02-17

Alan Gassman & Brandon Ketron: HHS Provider Relief Rules and Deadlines Modified by the January 28 and January 15 Announcements, with a Useful Summary of Other Available Programs for All Businesses
Steve Leimberg's Business Entities 220 2021-02-10

Alan Gassman, Brandon Ketron, Ian MacLean & Patrick Collins: COVID-19 Legislation Impacting Charities and Not-For-Profits (PART 1 OF 4) Steve Leimberg's Charitable Planning 305 2021-01-27

Alan Gassman & Brandon Ketron: The 10 Biggest Questions Following the Economic Aid Act & Subsequent Guidance
Steve Leimberg's Business Entities 217 2021-01-20

Alan Gassman & Brandon Ketron: Updates to PPP Reapplication Procedures Following SBA's Release of Procedural Notice 5000-20076
Steve Leimberg's Business Entities 216 2021-01-19

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Alan Gassman, Brandon Ketron & Alexander Sorley: Regulations Take SALT Out of Taxpayer Wounds for State and Local Taxes Paid by S Corporations and C Corporations
Steve Leimberg's Income Tax Planning 208 2020-12-23

Alan Gassman & Brandon Ketron: PPP and EIDL Loan Changes Following Passage of the Coronavirus Response and Relief Supplemental Appropriations Act
Steve Leimberg's Business Entities 215 2020-12-22

Alan Gassman & Ian MacLean - Charities Can Enjoy Enhanced Donations from Donors Who Wish to Contribute Appreciated Assets Plus Cash to a Combined Limit of Their Adjusted Gross Income
Steve Leimberg's Charitable Planning 304 2020-12-17

Alan Gassman & Brandon Ketron: PPP Loan Expense Deductibility - A Close Call for Tax Advisors, A.K.A. Machinations of Manocchio
Steve Leimberg's Business Entities 214 2020-12-14

Alan Gassman & Brandon Ketron on Revenue Ruling 2020-27 & Revenue Procedure 2020-51: Tax Treatment of Expenses Paid with PPP Loan Funds
Steve Leimberg's Business Entities 212 2020-11-22

Brandon Ketron & Alan Gassman: Necessity Questionnaire for Over $2,000,000 PPP Borrowers Causes Concern and Agitation
Steve Leimberg's Business Entities 211 2020-11-19

Alan Gassman & Brandon Ketron: Main Street Loans Available for Businesses in Need - New $100,000 Minimum
Steve Leimberg's Business Entities 210 2020-11-10

Alan Gassman, Brandon Ketron & Wesley Dickson: 2020 Year-End Tax Planning, With or Without a Regime Change
Steve Leimberg's Income Tax Planning 206 2020-10-27

Alan Gassman & Wesley Dickson - When to Unplug Great Grandpa and Other Tax Strategies to Consider
Steve Leimberg's Estate Planning 2832 2020-10-20

John Beck, Alan Gassman & Jerry Hesch - Termination of Charitable Lead Annuity Trusts, Why and How
Steve Leimberg's Charitable Planning 302 2020-10-15

Alan Gassman, Brandon Ketron & Kevin Cameron: Good News & Guidance for PPP Borrowers with Loans under $50,000
Steve Leimberg's Business Entities 209 2020-10-13

Alan Gassman, Brandon Ketron & Kevin Cameron: Entity Transfer, Gift & Income Tax Planning for PPP Borrowers - New Challenges Call for Old Solutions, Steve Leimberg's Business Entities 208 2020-10-12

Alan Gassman, Brandon Ketron, Katie Funk & Kevin Cameron - SBA Releases Procedural Notice-5000-20057 Giving Guidance on Transfers
Steve Leimberg's Business Entities 207 2020-10-05

Colleen M. Flynn, Alan S. Gassman & Ian MacLean: DOL Issues New Rules on when Paid Leave Must Be Paid and Will Be Reimbursed
Steve Leimberg's Employee Benefits and Retirement Planning 750 2020-09-24

Brandon Ketron, Alan Gassman & Kevin Cameron: SBA Releases New Interim Final Rules Placing Restrictions on Payments to Related Parties
Steve Leimberg's Business Entities 205 2020-08-26

Alan S. Gassman, Brandon L. Ketron, Patrick Collins & Ian MacLean: Understanding the PPP Workforce Reduction Rules after the August 4th, 2020 FAQs - Exceptions, Guidance & Resources
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Alan S. Gassman, Jerome B. Hesch & Martin B. Shenkman on the Biden 2-Step for Wealthy Families: Why Affluent Families Should Immediately Sell Assets to Irrevocable Trusts for Promissory Notes Before Year-End and Forgive the Notes If Joe Biden Is Elected, A/K/A What You May Not Know About Valuing Promissory Notes and Using Lifetime Q-Tip Trusts
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Alan S. Gassman And Brandon L. Ketron: August 4th PPP FAQ's Provide Some Clarification but Throw New Curve Balls at Small Business Owners
Steve Leimberg's Business Entities 203 2020-08-05

Alan Gassman, Brandon Ketron & Kevin Cameron on the Rubio/Collins Bill - A Deeper Dive
Steve Leimberg's Business Entities 202 2020-08-03

Alan Gassman & Brandon Ketron: PPP Questions for Owner-Employees
Steve Leimberg's Business Entities 201 2020-07-10

Christopher Denicolo & Alan Gassman: Lightning Strikes Twice in One Week - The IRS Releases Notice 2020-51 to Allow Those Who Took Required Minimum Distributions From IRA's in 2020 to Return Them, and Allows Non-Spousal Beneficiaries to Do So and More
Steve Leimberg's Employee Benefits and Retirement Planning 741 2020-06-25

Christopher Denicolo, Alan Gassman & Brandon Ketron on Notice 2020-50: The IRS Issues Guidance on 'Coronavirus-Related Distributions' and Other IRA and Retirement Plan Provisions Under the Cares Act
Steve Leimberg's Employee Benefits and Retirement Planning 740 2020-06-23

Brandon Ketron & Alan Gassman - SBA Releases New Interim Final Rules, a Revised Loan Forgiveness Application and Instructions, as well as a New EZ Form to Simplify the Forgiveness Process for Many Borrowers
Steve Leimberg's Business Entities 199 2020-06-18

Alan Gassman & Brandon Ketron - PPP Law Changes & the Wild Journey of the Program's Last 10 Days
Steve Leimberg's Business Entities 198 2020-06-16

Alan Gassman & Brandon Ketron: Don't Jump Off the (60%) Cliff! - Treasury and SBA Issue Joint Press Release Clarifying the New 60% Rule for PPP Loans
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Alan Gassman & Brandon Ketron - Congress Acts to Make PPP Law Changes that May Save Thousands of Businesses
Steve Leimberg's Business Entities 196 2020-06-04

John N. Beck, Brandon L. Ketron & Alan S. Gassman: PPP Loans and the Treatment of Independent Contractors and Sole-Proprietors with No Employees
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Alan Gassman & Brandon Ketron: May 22nd PPP Final Interim Rules Provide Further Guidance and Some Surprises
Steve Leimberg's Business Entities 193 2020-05-26

Alan Gassman, Brandon Ketron, Lawrence Starr & Kevin Cameron - Newly Published PPP Loan Forgiveness Application Provides Important Guidance for Borrowers
Steve Leimberg's Business Entities 191 2020-05-18

Alan Gassman & Brandon Ketron: SBA Issues New Guidance Providing Safe Harbor for Loans Under $2,000,000
Steve Leimberg's Business Entities 190 2020-05-14

Alan Gassman & Brandon Ketron on the Necessity of Determining Necessity by May 14: The SBA's Recent Change in Position Throws Thousands of Struggling Businesses into a Short-Fused Quandary - Partially Forgivable Government Loan to Avoid Layoffs or Po
Steve Leimberg's Business Entities 189 2020-05-12

Alan Gassman, Brandon Ketron & John Beck: PPP Loans Must Be Necessary to Avoid Fines and/or Imprisonment, but What Does Necessary Mean, Steve Leimberg's Business Entities 186 2020-04-27

Alan Gassman & Brandon Ketron: SBA Phase 3.5 Loan Legislation Passes the Senate - How this Impacts All Borrowers, Especially Independent Contractors and Proprietors
Steve Leimberg's Business Entities 184 2020-04-22

Alan Gassman, Brandon Ketron & John Beck: Why Aren't CARES Act Loans Available to Economically Reeling Landlords - A Crack in the Foundation of the CARES Act
Steve Leimberg's Business Entities 182 2020-04-16

Alan Gassman & John Beck - The Convertible Real Estate S Corporation Technique (CREST)
Steve Leimberg's Business Entities 181 2020-04-14

Alan Gassman, John Beck & Christopher Denicolo - IRA and Pension Law Rule Changes Under the CARES Act: Well Intentioned, But Will They Cause More Harm Than Good
Steve Leimberg's Employee Benefits and Retirement Planning 731 2020-04-09

Brandon Ketron, Christopher Denicolo and Alan Gassman: Understanding Emergency EIDL Grants and Loans Made Available under the Paycheck Protection Program
Steve Leimberg's Business Entities 180 2020-04-03

Alan Gassman and Adriana Choi: Creditor Protection During the Virus Crisis - 22 Definitions, 33 Strategies, and 26 Traps for the Unwary
Steve Leimberg's Asset Protection Planning 400 2020-03-30

Colleen Flynn, Alan Gassman & Ian MacLean: The Coronavirus Employee Paid Leave Law after March 24th Department of Labor Guidance, Including the 30-Day Non-Enforcement Provision
Steve Leimberg's Employee Benefits and Retirement Planning 729 2020-03-28

Colleen Flynn, Alan Gassman & Ian MacLean on H.R. 6201: Families First Coronavirus Response Act
Steve Leimberg's Employee Benefits and Retirement Planning 727 2020-03-24

Alan Gassman and Brandon Ketron: Planning with Coronavirus and Coronavirus & the Workplace
Steve Leimberg's Income Tax Planning 193 2020-03-16

Christopher J. Denicolo, Alan S. Gassman, Brandon L. Ketron & Ian MacLean on the SECURE Act: When Does the At Least As Rapidly Rule Apply and How Does this Relate to American Pie
Steve Leimberg's Employee Benefits and Retirement Planning 717 2020-01-14

Alan S. Gassman, Christopher J. Denicolo & Brandon Ketron - Feeling InSECURE with Estate Planning for Your Large IRA, then Consider the "TEA POT" Trust System, Unless Paying Taxes Is Your Cup of Tea
Steve Leimberg's Employee Benefits and Retirement Planning 716 2020-01-07

Alan Gassman, Brandon Ketron, Christopher Denicolo & John Beck: The Secure Act - What Estate Planners and Tax Advisors Need to Know for Clients with IRA and Pension Accounts
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Alan Gassman & John Beck: 13 Reasons Not to Invest in a Qualified Opportunity Zone, The Good, the Bad & the Ugly
Steve Leimberg's Business Entities 176 2019-12-31

John Beck, Brandon Ketron, Ken Crotty & Alan Gassman: IRS Finalizes Basic Exclusion Amount & Deceased Spouse Exclusion Amount Regulations - Why Well-Advised Affluent Taxpayers Should Be Ready to Use Their Exemption & How Families Will Save Millions
Steve Leimberg's Estate Planning 2767 2019-12-09

Alan S. Gassman and Adriana M. Choi on United States v. Lax: U.S. District Court for the Eastern District of New York Denies Motion to Dismiss Government's Lawsuit Seeking to Set Aside Alleged Fraudulent Conveyances
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Alan Gassman, Christopher Denicolo & Katherine Ammon on Dufresne v. Commissioner: A High-Income Psychic Fails to Foresee IRS Audit, Detection of $1,505,546 of Unreported Deposits, and $101,866 in Penalties Plus Litigation Expenses
Steve Leimberg's Income Tax Planning 186 2019-10-24

Alan Gassman & Adriana Choi on In the Matter of the Cleopatra Cameron Gift Trust: South Dakota Supreme Court Denies Full Faith And Credit To California Child Support Order Against Asset Protection Trust

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Alan Gassman, Martin M. Shenkman, Wesley Dickson & Joe Cuffel Rensin: Pigs Get Fat, But What About a Hippo - How an FTC Judgment, a Transported Offshore Trust and Florida Annuity Purchases All Caused the Perfect Storm for a Unique and Noteworthy
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Brandon L. Ketron & Alan S. Gassman: The Rumors of the Death of Crack and Pack Planning Were Greatly Exaggerated - The Related Party Rules Do Not Reach Many Arrangements and Significant Tax Dollars Can Be Saved, Steve Leimberg's Income Tax Planning 184 2019-08-14

Alan S. Gassman, Martin M. Shenkman & Joe Cuffel on Campbell v. Commissioner - Tax Court Concludes that the IRS Cannot Reach Assets in an Old and Cold Self-Settled Offshore Trust
Steve Leimberg's Asset Protection Planning 389 2019-08-05

Alan S. Gassman, Brandon L. Ketron & Kelsey Weiss - Little Known 199A Rules That Advisors Need to Be Aware Of
Steve Leimberg's Income Tax Planning 183 2019-07-30

Alan Gassman, Phil McLeod, and Joe Cuffel on Famiglio v. Famiglio: The 'a' that Cost $1.5 Million
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Alan Gassman, Ken Crotty, Chris Denicolo, John Beck & Amanda Schillinger: Don't Come Around Here No More, Going Down the Rabbit Hole and Avoiding Issues with Internal Revenue Code Section 2036(a)(2)
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Alan S. Gassman & Brandon Ketron: ABA Webinar Clarifies Some 199A Issues but Provides Unpleasant Surprises for Tax Practitioners
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Alan Gassman, John Beck & Michael Lehmann: Donor Controlled Charitable Business System
Steve Leimberg's Charitable Planning 280 2019-03-11

Alan Gassman & Martin Shenkman - When is Rental Real Estate a "Trade or Business" Under 199A
Steve Leimberg's Income Tax Planning 175 2019-02-18

Alan Gassman and Brandon Ketron - Just Missed It by That Much!
Steve Leimberg's Income Tax Planning 174 2019-02-12

Alan Gassman, Brandon Ketron & John Beck: Handling Specified Service Trades or Businesses & Non-Specified Service Trades or Businesses Under One Entity - What Rules Apply and Are Separate Books and Records Required
Steve Leimberg's Income Tax Planning 172 2019-01-28

Alan Gassman, John Beck & Brandon Ketron: How the Final 199A Regulations Changed the Definition of Performance of Services in the Field of Health
Steve Leimberg's Income Tax Planning 168 2019-01-21

Alan Gassman & Brandon Ketron: What the Final 199A Regulations Say Regarding Trust Planning
Steve Leimberg's Income Tax Planning 169 2019-01-21

Alan Gassman, Brandon Ketron & John Beck: One Particular Harbor - New Regulatory Guidance on If and When a Rental Real Estate Activity Can Qualify for the 20% Section 199A Deduction
Steve Leimberg's Income Tax Planning 170 2019-01-21

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Alan S. Gassman & Brandon L. Ketron: Are 529 Plans Better Investments Than Variable Annuities, Even If Not Spent on Education, and If So, Why Ever Use a Variable Annuity
Steve Leimberg's Financial Products Planning 5 2019-01-10

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“Using Multiple Entities to Reduce Income Taxes for Families Owning Personal Service Corporations Under Section 199A and Unique Concerns”, Steve Leimberg’s Income Tax Planning Email Newsletter #136, March 12, 2018.

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"More Bankruptcies, More Opportunities and Challenges for CPAs, with Sidney Kess and Lee Slavutin, The CPA Journal, December 2020.

"Reviewing Contracts with Customers: How CPAs Can Advise Business Owners", with Martin Shenkman, June 2019.

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"The Asset Protection Planning Continuum-Practice Steps for Estate Planning Lawyers and Others", with Martin S. Shenkman, NAEPC Journal of Estate & Tax Planning, February 6, 2017.

"The Role of Credit Shelter Trusts Under the New Estate Tax Law", Estate Planning Journal, May 2014.

"The Stepped-Up Basis Conversation", Bloomberg BNA Tax Management, Estates, Gifts and Trusts Journal, January 2014 with Jonathan Blattmachr.

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New Tax Law Rewards Charitable IRA Retirees with a $50,000 Income Tax Deferral Opportunity - 12/30/2022
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A Guide to Tax Planning for Victims of Hurricane Ian and Other Disasters - 10/1/2022
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What the IRS can Learn from the Florida Bar Tax Section: Comments to Clawback Proposed Regulations - 8/11/2022
Gun Law Changes Will Impact Legal Advisors - 6/24/2022
DeSantis Delivers an Estate Tax Savings Gift for Floridians - 5/25/2022
IRS Clawback Proposed Regulation Causes Confusion in the Playing Field - 4/28/2022
President's Tax Plan Would Kill or Suppress Numerous Common Estate Tax Planning Techniques - 3/29/2022
Your Advisor's Guide to the New IRA Distribution Proposed Regulations - 3/18/2022
New Stark Law -Will Doctors be Caught Naked - 12/23/2021
DeSantis Prohibits Employers from Terminating the Unvaccinated in the Midst of Omicron - 12/2/2021
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The Death of the Fourth Quarter Employee Retention Credit - 11/23/2021
Hey President Biden - What Taxes Are You Now Imposing On Businesses And High Earners? - 10/29/2021
Hey President Biden - What Are You Doing On Estate Taxes? - 10/28/2021

One More Scary Estate Tax Change And New Action Items For Many Affluent Taxpayers - 10/6/2021
Pandora Trust Disclosures - Less Fraud Than You Expect - 10/5/2021
Income Tax Law Changes - What Advisors Need To Know - 9/16/2021
Estate Tax Law Changes - What To Do Now - 9/14/2021
How To Be Part Of The $5.8 Billion Of Automatic Federal Student Loan Forgiveness For The Disabled - 8/19/2021
New ERC Rules Beyond Family Ownership Issues, And What To Do If You Got The Credit And The Owner Has A Relative - 8/7/2021
Newly Issued Employee Retention Credit Guidance Punishes Owner Employees If They Have Living Family Members - 8/5/2021
Borrower Friendly PPP Loan Forgiveness Regulatory Changes Provided By The New SBA Regulation - 8/5/2021
New CMS Pronouncement On Parent/Subsidiary Medical Practice And Business Entities - 8/5/2021
Florida Supreme Court Tells The American Bar Association What To Do - 6/11/2021
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Florida Supreme Court Tells The American Bar Association What To Do - 6/11/2021
Senate Estate and Gift Tax Bill Will Reduce Exemption to $3,500,000 and Take Away Many Opportunities - 3/27/2021
All There Is To Know About the Restaurant Revitalization Stimulus Rules - 3/18/2021
Planning to Maximize Your Employee Retention Credit - 3/17/2021
Delinquent Student and Non-Fraud Past Felons Can Now Receive PPP Loans - 3/4/2021
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The New $10,000 EIDL Program Under the $1.9 Trillion Stimulus Package - 3/4/2021
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The Legal Fallout Expected After the Capital Riots - 1/12/2021
January 6th SBA Regulations Help Solidify PPP and EIDL Changes - 1/7/2021
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Stimulus Checks for Those Earning More than $75,000/$150,000 - How It Works - 12/28/2020
Good News for Restaurants and Other Food Service Providers Taking Second Draw PPP Loans - 12/28/2020
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Key PPP and EIDL Takeaways Under Bill Released Monday - 12/21/2020
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PPP Borrower Tax Relief Under Stimulus Bill - It's Finally Happening - 12/19/2020
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Five Important COVID-19 Stimulus Law Provisions - 12/18/2020
Are PPP Loan Expenses Deductible? It's Complicated - 12/17/2020
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Necessity Questionnaire for Over $2,000,000 PPP Borrowers Causes Concern and Agitation - 11/13/2020
PPP Borrowers May Now Apply for $100,000+ Main Street Loans - 11/2/2020
Unprecedented Charitable Tax Planning Opportunities in 2020 - 10/30/2020
Biden Estate Tax Implications and When to Unplug Great Grandpa - 10/27/2020
New PPP Application 3508S For Many But Not All - 10/9/2020
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Medical Practices Have Received Their Share of $30 Billion CARES Act Distribution - 4/15/2020
Florida Governor's Stay-at-Home Order Clarified By Q&A - 4/5/2020
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Tricks of the Trade: Insuring Residential Rental Property - 7/31/2019
Anything You Text May Be Held Against You - 7/31/2019
American Bar Association Tax Section Harbors Disdain for Section 199A's Rental Safe Harbor 7/2019
1.5 Million Reasons to Carefully Check Your Legal Documents - 7/12/19
Tax Alert for IRA and Pension Account Holders - 7/19/2019
New Upcoming Pension and IRA Tax Law Changes: Here Come the Annuity Sales! - 5/31/2019
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The Donor-Controlled Charitable Business – 3/20/2019
Why Is The IRS Punishing Triple Net Landlords? – 1/26/2019
What To Ask Your Tax Advisors About The New Section 199A Regulations - 1/20/2019
The Most Valuable Gift You Can Give: A Good Estate Plan - 12/17/2018
Your Biggest Financial Nightmare Is Parked In Your Driveway - 12/5/2018
Hazards Of Direct Or Indirect Real Estate Ownership Under An IRA - 11/2/2018
Real Estate Investing With Section 199A: Don't Let Your Deductions Fly Out The Window -11/2/2018
Does Rental Income Qualify For The New 20% Section 199A Deduction? - 11/1/2018

How Long Does The IRS Have To Pursue Tax Fraud? - 10/8/2018
What Is An Independent Contractor? Here's Why It Matters Under The Trump Tax Law - 10/5/2018
How To Avoid A Healthcare Surrogate Tragedy - 10/4/2018
What To Do When You Might Get Sued - 10/2/2018
IRS Spokespeople Discuss 199A - What Will The Final Regulations Say? - 9/15/2018
How To Assess If Your Life Insurance Policy Is A Good Fit - 8/31/2018
Proposed Regulations Blow The Roof Off Of Many Real Estate Deduction Opportunities - 8/28/2018
678 Ways To Qualify For The 199A 20% Deduction - 8/22/2018
Beautiful Losers: The Discriminatory Nature Of The 199A Proposed Regulations - 8/22/2018
199A - The Real Regulatory Story: Revelations From The Proposed Regulations - 8/10/2018
New IRA Guidance On Pre-Kindergarten 529 Plans And Other Issues - 8/8/2018
Flow-Through Business Owners Line Up For Advice On New 199A Deduction - 8/6/2018
Client Relationships: Don't Forget the Five Commandments by Alan S. Gassman and Kateline Tobergatei

NOTABLE NATIONAL CONFERENCES AND SEMINARS PRESENTED BY: ALAN S. GASSMAN

Maui Mastermind, Tampa, FL 2023 Presentation:

Estate Planning and Asset Protection for Business Owners

NOV 2021 52nd Annual United Jewish Appeal (UJA) Federation Sidney Kess 52nd Annual Estate, Tax, & Financial Planning Conference:

Charitable Planning for Real Estate Investors and Developers

OCT 2021 Notre Dame Tax and Estate Planning Institute Presentation:

Tools and Strategies to Avoid Ethical Issues in Estate Planning

JUN 2021 AICPA Engage Conference, Las Vegas, NV:

Ready for Sale: Panel on Businesses in Distress

Bankruptcy Planning, Execution & Solutions for Debtors and Collectors

OCT 2020 Notre Dame Tax and Estate Planning Institute Presentation:

Cares Act Loan Forgiveness; Tax Issues and Related Aftermath of Covid 19 if the Loan Is Repaid.

Panel Participant on Rescue Planning for Existing CLAT's and CRT's Where Lower Asset Values Will Deplete Principal, Reducing or Eliminating the Estate Plan Benefits.

SEP 2020 United Jewish Appeal (UJA) Sidney Kess 51st Annual Estate, Tax and Financial Planning Conference:

Bankruptcy And Insolvency Planning For Businesses And Professionals

SEP 2019 Notre Dame Tax and Estate Planning Institute Presentation:

Application of Section 199A, and its Interaction with Other Income Tax Rules, to Real Estate Investors, Operators and Developers

Creative Planning with Section 199A

OCT 2018 Notre Dame Tax and Estate Planning Institute Presentation:

Creative Planning with Section 199A

OCT 2017 Notre Dame Tax and Estate Planning Institute Presentation:

What Every Tax and Estate Planning Lawyer Should Know About Bankruptcy.

SEP 2015 Notre Dame Tax and Estate Planning Institute Presentations:

Creative Use of Trust and Estate Planning Structures to Avoid Litigation.

Understanding Illustrations, Design Opportunities and Financial Evaluation of Whole Life, Universal and Variable and Equity Indexed Life Insurance (Part I)

Life Insurance: When to use Which Kind of Policy for What, and Split Dollar and Premium Financing Factors That Impact Policy Selection and Design (Part II)

NOV 2014 Notre Dame Tax and Estate Planning Institute Presentations:

The Mathematics of Estate Planning (2 hours)

Evaluating Commercial Annuities and Reverse Mortgages: Are Deferred Payment Annuities Too Good To Be True? (1 hour)

OCT 2013 Notre Dame Tax and Estate Planning Institute Presentation:

Interesting Interest: Selecting the Highest and Lowest Interest Rates Permitted, Timing of Interest, Impact of Interest Rates on Estate Plans. (2 hours)

JUN 2017 AICPA Engage Conference, Las Vegas, NV:

Life Insurance Planning Techniques, Tax Planning – and The Good, The Bad and The Ugly.

Nebraska Medical Association Conference, Lincoln, Nebraska, September 2017:

The Ten Biggest Mistakes that Physicians Make in Their Investment and Business Planning.

Maui Mastermind, Irvine, CA 2019 Presentation

The Behind the Scenes Legal Secrets to Sell, Scale or Transition to Owning Your Business Passively

Maui Mastermind, San Diego, CA 2018 Presentation:

The Owner Independent Company

Maui Mastermind, Hawaii, 2017 Presentations:

The ABC's of Important Creditor Protection Strategies

Maui Mastermind, San Diego, CA, 2017 Presentation:

Business Preservation Planning Checklist

Maui Mastermind, Maui, Hawaii, 2016 Presentations:

Asset Protection and Estate Planning for Business Owners

The Outline and Presentation for "Asset Protection in the Estate Plan" has been presented on numerous occasions, including:

American Law Institute – American Bar Association Sophisticated Estate Planning Techniques, Boston, Massachusetts, 1999.

Midwest Tax and Estate Planning Conference, Indianapolis, Indiana, 1999.

The Florida Bar Tax Section Wealth Conservation Conference, 1999.

Pinellas County (Florida) Estate Planning Council.

Pasco County (Florida) Estate Planning Council.

Pensacola County (Northwest Florida) Estate Planning Council.
Orange County (Florida) Estate Planning Council and Orange County (Florida) Probate and Guardianship Section.

Sarasota County (Florida) Estate Planning Council.

Estate Planning Council of the Nature Coast.

Marion County (Florida) Medical Association.

Medical Business Leaders Network Seminar, 2012.

Naples Estate Planning Council, 2017

Jacksonville Estate Planning Council, 2017

Miami Estate Planning Council, 2017

West Pasco Bar Association (New Port Richey), 2017

New Port Richey Charitable Consortium, 2017

Estate Planning Council of Greater Miami, 6th Annual Estate Planning Symposium, Coral Gables, 2018

ADDITIONAL NATIONAL CONFERENCES AND SEMINARS PRESENTED BY ALAN S. GASSMAN

12/08/2022 - NYS Society of CPA's Annual Conference - Estate & Trust Tax Law Update & Business Entity Planning
11/02/2022 - Vascula Surgery Community - M.O.N.I..E.S. For the Vascular Surgeon
10/20/2022 - FICPA FSU Accounting Conference - Practical Planning for Business and Estate Planning Clients in View of Florida Law and Recent Developments & The CPA's Guide to Estate and Trust Planning Before and After Death
9/20/2022 - UJA Federation Annual Conference - 50 Ways to Leave Your Legacy - Charitable Planning Strategies You Forgot or Didn't Know About
07/13/2022 - Florida Bar - Hot Topics and Best Strategies for Estate Tax Planning Part 2
6/22/2022 - Financial Experts Network - Asset Protection From A to Z

6/14/2022 - AIRA Tax Conference - Representing the Challenged Debtor - Tax Planning And Stress Control
5/5/2022 - Beverly Hill Bar Association BHBA - If and When You Leave CA - Where Should You Go
4/27/2022 - FL Tax Bar Section - Hot Topics and Best Strategies for Estate Tax Planning
3/17/2022 - Estate Planning Council Of Central New Jersey - What You Need To Know About FL Law And Practices For Your Clients There
2/26/2022 - MOTE Vascular Foundation Symposium - Building A Successful Practice What You Were Not Taught In Your Fellowship
2/10/2022- Johns Hopkins All Children's 24th Annual Estate, Tax, Legal & Financial Planning Seminar
10/20/2021 - 52nd Annual Sid Kess UJA-Federation Estate, Tax, & Financial Planning Conference
10/22/21 - Notre Dame - Tools and Strategies to Avoid Ethical Issues in Estate Planning
11/4/21 - Estate Planning Council of Birmingham - Innovative Charitable Planning Techniques
12/9/2021 - FICPA - Estate Tax Planning Techniques
9/22/2021 - Chattanooga Tax Practitioners PPP & ERC Update
6/16/2021 - AIRA 37th Annual Bankruptcy & Restructuring Conference Virtual Series, Alan Gassman and Christopher Denicolo present: Tax Planning for Troubled Companies Involving CODI
5/18/2021 & 5/20/2021 - Alan Gassman presents Michigan ICLE Institute of Continuing Legal Education Annual Probate & Estate Planning Institute - Nuts, Bolts, and Innovative Strategies for Charitable Planning" & "What Estate Planners Need To Know about Bankruptcy
4/7/2021 - SCORE Manasota - Barry Portugal, Alan Gassman and Brandon Ketron present: The American Rescue Plan Act: Important New Updates for Small Business Owners from 5:30 to 7 PM EDT
3/11/2021 - NYSSCPA FAE-Alan Gassman and Brandon Ketron present: PPP and Employee Retention Credit (ERC) Update - What is New and What is Still to Come from 11 AM to 1 PM EST
3/11/2021 - MyTaxCoursesOnline - Alan Gassman and Christopher Denicolo present: Tax Planning for Insolvency and the Discharge of Indebtedness from 2 to 3 PM EST
2/27/2021 - MOTE Vascular Surgeon Conference-Alan Gassman presents: Managing your Money: How to save it, manage it and protect it from 1:30 to 2:15 PM EST
2/9/2021 - BankersWeb - Alan Gassman and Brandon Ketron present: PPP Loans from 2 to 3 PM EST
2/22/2021 - Pace University Small Business Development Center - Alan Gassman and Ramona Cedeno present: TAXES AND THE PANDEMIC CARES ACT - REGULATORY COMPLIANCE ISSUES AND OPPORTUNITIES FOR SMALL BUSINESS from 2 to 3:30 PM EST

2/23/2021 - Estate Planning Council of Northern New Jersey - Alan Gassman presents: WHAT YOUR BEST CLIENTS NEED TO KNOW ABOUT FLORIDA LAW AND PLANNING from 4:30 to 5:30 PM EST
1/22/2021 - Lawyer 2 Lawyer Podcast - Alan Gassman and Craig Williams discuss: Legal Liability after the Capitol riots
1/15/2021 - NYSSCPA FAE - Alan Gassman, Sidney Kess & Brandon Ketron present: SBA Explanation of New Cares Act Changes For PPP, EIDL, etc: What Advisors Need To Know from 10 to 11:40 AM EST
12/30/2020 - NYSSCPA FAE - Alan Gassman and Brandon Ketron present: What CPAs need to know about the Latest COVID-19 Stimulus Bill from 3 to 5
12/1/2020 - Ohio State Bar Association's Great Lakes Asset Protection Institute - Alan Gassman presents: Ten Examples of Asset Protection Plans that have Worked from 9 to 10:30 AM EST
12/1/2020 - Ohio State Bar Association's Great Lakes Asset Protection Institute - Alan Gassman participates in the Panel Discussion from 4:30 to 5 PM EST
11/16/2020 - AICPA Sophisticated Tax Conference in Washington, D.C. - Alan Gassman presents: Dynamic Planning for Professionals and Their Entities from 5:20 to 6:10 PM EST
11/17/2020 - AICPA Sophisticated Tax Conference in Washington, D.C. - Alan Gassman and Brandon Lagarde present: COVID 19: What Did We Learn About Financial Viability During a Pandemic - Part 1 from 12:40 PM to 1:30 PM EST
11/17/2020 - AICPA Sophisticated Tax Conference in Washington, D.C. - Alan Gassman and Brandon Lagarde present: COVID 19: What Did We Learn About Financial Viability During a Pandemic - Part 2 from 1:40 PM to 2:30 PM EST
10/21/2020 - Reno Estate Planning Council - Alan Gassman presents: Dynamic Planning With Irrevocable Trusts After TRA from 11 to 12:30 PM EDT
10/7/2020 - Johns Hopkins All Children's Annual Estate Planning Seminar - Alan Gassman presents: Year's End Hot Topics for Estate and Tax Planners from 12:30 to 1:30 PM EDT
9/8/2020 - Shenkman Law Webinar - Alan Gassman, Jerry Hesch and Martin Shenkman present: Estate Tax Planning Opportunities for 2020 For Clients Hesitant to Plan from 4 to 5:30 PM EDT
9/21/2020 - AICPA's Tax Strategies Conference - Alan Gassman, Brandon Ketron and Kevin Cameron present: PPP Part 2 and More, Where We Are and Where We Are Going from 2 to 2:50 PM EDT
7/23/2020 - New York State Society of CPAs - Alan Gassman, Brandon Ketron and Kevin Cameron present: PPP LOAN FORGIVENESS RULES: WHAT CPA'S NEED TO KNOW - A THOROUGH AND INFORMATIVE PROGRAM WITH VALUABLE MATERIALS AND CHARTS from 9 to 11 AM EDT
5/15/2020 - Interactive Legal webinar - Alan Gassman, Brandon Ketron and John Beck present: CARES Act and Related Planning for Landlords, Developers and Real Estate Investors from 1 PM to 2:30 PM ET
5/13/2020 - Interactive Legal roundtable webinar - Alan Gassman as part of a roundtable discussion on Marketing Your Practice in Times of Crisis, Fear and Uncertainty from 12 PM to 1:30 PM ET

5/12/2020 - Lion Street Webinar - Alan Gassman presents: necessary to support the ongoing operations of the business from 2:30 PM to 3:30 PM ET
5/7/2020 - Annual May Meeting for Estate Planning Council of Northern Nevada in Reno, NV - Alan Gassman presents: Dynamic Planning with Irrevocable Trusts after TRA from 9:30 AM to 12 PM PT
4/22/2020 - Maui Mastermind Webinar - Alan Gassman and Brandon Ketron present: SBA LOAN QUESTIONS AND ANSWERS from 3 PM to 4 PM EDT
4/13/2020 - Milwaukee Tax Club Monthly Webinar - Alan Gassman presents Section 199A Planning from 1 PM to 1:50 PM ET
4/9/2020 - Lion Street Webinar - Alan Gassman and Brandon Ketron present: Corona Virus Loans and What You Need to Know About Them from 2 PM to 3 PM ET
4/8/2020 - Peak trust webinar recording - Alan Gassman presents: Asset Protection geared toward financial planners from 4 PM to 5 PM ET
3/21/2020 - North American Telugu Society webinar - Alan Gassman and Paula Reeves present: Important Knowledge About Term Life Insurance from 2 PM to 2:30 PM ET
2/29/2020 - North American Telugu Society Member webinar - Alan Gassman presents: Estate Planning Essentials: Don't Leave Your Family Out In The Cold from 11 AM to 12 PM ET
2/21/2020 - Webinar sponsored by Peak Trust Company - Alan Gassman and Martin Shenkman present: Asset Protection for Physicians and their Practices: The Doctor is In — But Where is the Tax and Estate Planning? - Part 2 from 12 PM to 1 PM ET
2/14/2020 - LawEasy Webinar - Alan Gassman and Martin Shenkman present: Asset Protection for Physicians and their Practices: The Doctor is In---But Where is the Tax and Estate Planning? - Part 1 from 12 PM to 1 PM ET
1/31/2020 - ABA Tax Section Meeting in Boca Raton, FL - Alan Gassman participates in a panel discussion: TCJA - Hot Topics for Closely Held Businesses from 2:30 to 3:30 PM ET
11/14/2019 - Maui Mastermind Wealth Summit at The Fairmont Orchid in The Big Island, HI - Alan Gassman presents: Estate Planning and Legal Considerations for Life Post Exit: What do you need to set up today for life post exit? from 9:45 AM to 11 AM (local/GMT-10)
7/18/2019 - 2019 Maui Mastermind Wealth Summit Bonus Webinar - Alan Gassman presents: Nuts and Bolts of Business and Investment Entity Planning from 3PM to 4PM ET
6/16/2019 - MER at "The Gwen" in Chicago-Personal and Practice Protection: How to Enhance Income, Increase Productivity and Enjoy Work/Life Balance (7:30-8:30AM) Essential Creditor Protection and Retirement Planning Considerations (8:30-9:30AM) Section 199A Regulations: A First Look, Alan Gassman with Martin Shenkman and Jonathan Blattmachr, WealthManagement.com, August 28, 2018.
4/2018 - Florida Law for Snowbirds – Estate Planning and Business Law You Need to Know for Your Florida Client, Alan Gassman with Christopher Denicolo, Esq. and Martin Shenkman, Esq., New Jersey State Bar Association

Understanding Bankruptcy, Insolvency and Corporate Predator Planning, Maui Mastermind, April 2018.
Estate Planning for Snowbirds and Florida-Based Clients, InterActive Legal Lifestream Presentation, June 2, 2016.
Individual and Group Medical Practices: Tax, Health Law and Creditor Protection, Accounting Today, June 19, 2012.
Advisor for Maui Mastermind Wealth Summit, “The Big Island”, Hawaii, November 2019.
“Essential Creditor Protection and Retirement Planning Considerations”, (MER) Medical Conference Lecturer, Chicago, Illinois, June 2019.
Puerto Los Cabos, Mexico, November 2018.
Big Sky, Montana, July 2018.
Nassau, Bahamas, May 2018.
New York City, New York, October 2017.
“Qualified Business Income (Section 199A)”, J. Nelson Young Tax Institute, Chapel Hill, North Carolina, April 2019.
“What New Jersey Lawyers Need to Know About Florida Law”, New Jersey State Bar Association, Brunswick, New Jersey, March 2019.
“What to Do for Clients Who No Longer Worry About Estate Tax”, New Jersey State Bar Association, Brunswick, New Jersey, March 2019.
“199A and the New Trust Regulations”, 21st Annual Estate, Tax, Legal & Financial Planning Seminar, St. Petersburg, Florida, February 2019. Other Speakers were: Ed Slott, Paul S. Lee, Christopher R. Hoyt, Sandra D. Glazier and Jerome M. “Jerry” Hesch.
“The Behind the Scenes Legal Secrets to Sell, Scale or Transition to Owning Your Business Passively”, Scale and Grow Rich (Maui Mastermind), Irvine, California, January 2019.
“Dynamic Planning Strategies for the Conscientious Planner”, The McGehee Group 14th Annual Advisors Conference, Las Vegas, Nevada, October 2018.
“Asset Protection Techniques for Businesses and Individuals (With No Need For Offshore Trusts)”, Federal Tax Institute of New England, Rocky Hill, Connecticut, October 2018.
“Planning with Variable Annuities and Other Annuity Products”, Ohio State Bar Association, 25th Annual Conference on Wealth Transfer, June, 2014.
“Structuring Joint Exempt Step-Up Trusts (JESTs)”, Ohio State Bar Association, 25th Annual Conference on Wealth Transfer, June 2014.
“Practical Estate Planning with a $5.25 Million Exemption Amount”, Salt Lake City AICPA Advanced Estate Planning Conference, November, 2013.
“Interest Free Loans”, Salt Lake City AICPA Advanced Estate Planning Conference, November, 2013.
“Florida Law for Tax, Business and Financial Planning Advisors”, New Jersey Bar Association, New Jersey, November, 2013 and October, 2014.
“Asset Protection, Tax Law Changes, Pain Law Changes and Other Hot Topics”, Nature Coast PAHCOM Seminar, August 2013.
“Dynamic Strategies for Wealth Management with an Update on Recent Law Changes”, All Children’s Hospital Foundation, 2005.

"Fully Utilizing the Advantages of Limited Liability Companies in Florida", National Business Institute, 2005.
"Survey of Practice Planning Techniques for the Large Estate Plan in Florida", National Business Institute, 2004.
"Family Limited Partnership and Limited Liability Companies in Florida", National Business Institute, 2004.
"Physician and Medical Practice Asset Protection Planning, A Survey of Planning Techniques, Tax, Creditor and Other Legal Concerns, and Recent Development Updates", Sterling Education Services Seminar, 2003.
"Legal Ethics for Professionals Handling Partnerships and Limited Liability Companies", National Business Institute, 2003.

NOTABLE FLORIDA PRESENTATIONS AND WEBINARS PRESENTED BY ALAN S. GASSMAN:

Ave Maria School of Law Professional Acceleration Workshops for students and alumni at Ave Maria School of Law and Florida Bar Members.

AUG 2017 Ave Maria Professional Acceleration Workshop, 1025 Commons Circle, Naples, Florida
AUG 2015 Ave Maria Professional Acceleration Workshop, 1025 Commons Circle, Naples, Florida

University of Florida Professional Development Workshops for students and alumni at the University of Florida Levin College of Law.

FEB 2020 Professional Acceleration Workshop For Tax And Estate Planning Lawyers
FEB 2019 Professional Acceleration Workshop For Tax And Estate Planning Lawyers, Gainesville, Florida
SEP 2018 University of Florida Advisor Network Exclusive Gator Gathering, Continuing Education: Dynamic Planning Strategies for the Well Informed Advisor, Gainesville, Florida
MAR 2016 Tax & Estate Planning Lawyers Guide To Professional Success, Fulfillment, And Everything Else You Can Think Of Wanting

ADDITIONAL FLORIDA PROGRAMS AND LECTURES PRESENTED BY ALAN S. GASSMAN:

12/16/2021 -Suncoast Estate Planning Council, Alan Gassman, Brandon Ketron and Christopher Denicolo present a virtual conversation on Estate & Gift Tax Updates

12/9/2021 -FICPA 2nd Annual Federal Tax Conference Presentation, Estate Tax Planning Techniques

12/2/2021-Estate Planning Council of Coral Gables, FL Alan Gassman presents a lecture on Creditor Protection Nuts & Bolts

11/16/2021-St. Pete/Clearwater Bar-Estate Planning and Tax for the Probate Breakout by Alan Gassman

7/21/2021 -Alan Gassman, Jesse Turtle, Professor Jerome Hesch, and Grace Paul present: Charitable Planning for the Business Owner (Saint Petersburg College Charitable Series)

6/16/2021 -Alan Gassman, Jody Craig, and Professor Jerome Hesch present: Life Insurance Planning, Including Term Life Insurance for Charitable and Non-Charitable Purposes (Saint Petersburg College Charitable Series)

5/10/2021-Paralegal Association of Florida: Pinellas Chapter-Alan Gassman presents: Making Your Job Better and Your Firm More Successful - the Legal Assistant's Guide to Liberation and Effectiveness from 12 to 1 PM ET

5/13/2021-FICPA- Spring Accounting Conference-Alan Gassman presents: Fine Tuning and Improving Estate and Asset Ownership Planning For All Categories of Clients from 12:50 to 1:40 PM EDT & The Florida CPA's Practice Guide to Effective Creditor Protection Planning from 1:50 to 2:40 PM EDT

5/19/2021 -Alan Gassman and Dr. Luz D. Randolph present: Private Foundations from A to Z. How Private Foundations help Donors help Public Charities and Causes (Saint Petersburg College Charitable Series)

4/21/2021-Alan Gassman and Dr. Luz D. Randolph present: A Survey of Charitable Gifting Vehicles from 12:30 to 1:30 PM EDT (Saint Petersburg College Charitable Series)

4/20/2021-Alan Gassman, Shannon Sumerlin and Andrea Fourman present: Tax Smart Giving for University of Florida Law Alumni from 12:30 PM to 1:20 PM EDT

4/7/2021-SCORE Manasota-Barry Portugal, Alan Gassman and Brandon Ketron present: The American Rescue Plan Act: Important New Updates for Small Business Owners from 5:30 to 7 PM EDT

3/26/2021-Florida Bar Tax Section CLE-Alan Gassman, Leslie Share and Brandon Ketron present: Creditor Protection Nuts & Bolts from 9 AM to 2 PM EDT

3/26/2021 - Florida Bar Tax Section CLE - Alan Gassman, Leslie Share and Brandon Ketron present: Creditor Protection Nuts & Bolts from 9 AM to 2 PM EDT

3/17/2021-Alan Gassman and Dr. Luz D. Randolph present: New Charitable Contribution Tax Laws and Recent Developments, Including The Over $100,000/Year IRA opportunity for IRA account owners over 59 1/2 and the New IRA Distribution Rules for Charitable and Non-Charitable Beneficiaries from 12:30 to 1:25 PM EDT (Saint Petersburg College Charitable Series)

3/3/2021- FICPA - Alan Gassman presents: The Florida CPA's Guide to Creditor Protection from 1 to 1:50 PM EST

2/24/2021-FICPA-Alan Gassman and Brandon Ketron present: Practical Planning for the Employee Retention Credit from 1 to 1:50 PM EST

2/27/2021-MOTE Vascular Surgeon Conference-Alan Gassman presents: Managing your money: how to save it, manage it and protect it from 1:30 to 2:15 PM EST

3/3/2021-FICPA-Alan Gassman presents: The Florida CPA's Guide to Creditor Protection from 1 to 1:50 PM EST

1/29/2021-Florida Bar: Representing the Physician-Alan Gassman presents: Medical Practices And PPP, EIDL, and Provider Relief Fund Planning and Implications from 3 to 3:50 PM EST

1/22/2021-Collier County Bar Association-Alan Gassman presents: An Estate Tax Planning Tune Up from 11 AM to 12 PM EST

1/11/2021-FICPA-Alan Gassman and Brandon Ketron present: What CPAs need to know about the Latest COVID-19 Stimulus Bill from 3 to 4:40 PM EST

1/5/2021-FICPA-Alan Gassman and Brandon Ketron present: What CPAs need to know about the Latest COVID-19 Stimulus Bill from 3 to 4:40 PM EST

12/18/2020-Palm Beach Bar Estate and Probate Section -Alan Gassman and Brandon Ketron present: 2020 Year End Planning from 12 to 1:30 PM EST

12/10/2020-FICPA-Alan Gassman and Brandon Ketron present: Implementation of TCJA guidance from 9 to 9:50 AM EST

11/19/2020-Clearwater Jazz Holiday Foundation-Alan Gassman sponsors: Wanderlust - A Reimagined Live Music Experience for 2020 from 6 to 9 PM EST

10/23/2020-Florida Bar Tax Section CLE-Alan Gassman, Leslie Share and Denis Kleinfeld present: Advanced Asset Protection Workshop (BLOCK 9AM to 2PM) 8:50 to 9 AM Introduction, 2:05 to 2:30 PM - Alan presents: Florida and Federal Creditor Protection Law Developments and Strategies

10/22/2020-Children's Home Society of Florida Webinar-Alan Gassman presents: Will & Trust Planning from A-Z from 12:30 to 1:30 PM EDT

10/22/2020-Children's Home Society of Florida Webinar-Alan Gassman does a live Q&A from 5:55 to 6 PM EDT

10/16/2020-Estate Planning Council of Naples Success Event-Alan Gassman presents: Success Techniques for your Estate Planning Practice from 9 AM to 12 PM EDT

10/16/2020-USF Resident Intern meeting at Tampa General Hospital in Tampa, FL-Alan Gassman presents: Contract Negotiations from 4 to 5 PM EDT

10/2/2020-USF Resident Intern meeting at Tampa General Hospital in Tampa, FL-Alan Gassman presents: Contract Negotiations from 4 to 5 PM EDT

8/28/2020-USF Resident Intern meeting at Tampa General Hospital in Tampa, FL-Alan Gassman presents: Contract Negotiations from 4 to 5 PM EDT

7/16/2020-Florida Society of Interventional Pain Physicians Conference at the Diplomat Hotel in Ft. Lauderdale, FL-Alan Gassman presents: something like FOMA

7/3/2020-Florida Bar Tax Section Event at Amelia Island, FL-Alan Gassman presents: Tax Lawyer Professional Acceleration Workshop from 8:30 AM to 12:30 PM ET

6/5/2020-USF Resident Intern meeting at Tampa General Hospital in Tampa, FL-Alan Gassman presents: Contract Negotiations from 4 PM to 5 PM ET

5/20/2020-Summer TAX 6065 Contemporary Issues in Taxation at USF in Tampa, FL-Alan Gassman presents: Dynamic And Impactful Communications And Presentation Skills For The Successful Professional from 5 PM to 7:10 PM ET

5/15/2020-USF Resident Intern meeting at Tampa General Hospital in Tampa, FL-Alan Gassman presents: Contract Negotiations from 4 PM to 5 PM ET

5/1/2020-USF Resident Intern meeting at Tampa General Hospital in Tampa, FL-Alan Gassman presents: Contract Negotiations from 4 PM to 5 PM ET

4/21/2020-Florida Bar Tax Section Spring Creditor Protection Course-Alan Gassman, Brandon Ketron and Leslie Share present: Advanced Asset Protection Workshop from 10 AM to 3:40 PM ET

4/9/2020-Danny Capitel webinar-Alan Gassman presents: FDIC from 10:30 AM to 10:55 AM ET

2/22/2020-Levin College of Law in Gainesville, FL-Alan Gassman presents: Professional Development Workshop from 9 AM to 1 PM ET

1/15/2020-Heckerling Institute on Estate Planning in Orlando, FL-Alan Gassman will be presenting at the Interactive Legal luncheon and exhibit booth with Dr. Srikumar Rao

11/7/2019-FICPA University of Florida Accounting Conference at Hilton U of F in Gainesville, FL-Alan Gassman presents: Creative Planning and Traps for the Unwary Under Section 199A from 3:40 PM to 4:30 PM ET

10/22/2019-Florida Bar Tax Section CLE at University of Miami Law School in Miami, FL-Alan Gassman and Leslie Share present: Advanced Asset Protection Workshop from 1:30 PM to 5:30 PM ET

10/24/2019-FICPA USF Accounting Conference at The Barrymore Hotel Tampa Riverwalk in Tampa, FL-Alan Gassman presenting: Asset Protection for Professionals from 8 AM to 8:50 AM ET

10/24/2019-FICPA Florida Gulf Coast University Accounting & Tax Conference at Embassy Suites Fort Myers in Estero, FL-Alan Gassman presenting: Creative Planning with Section 199A from 2:05 PM to 2:55 PM ET

8/20/2019-Community Event at Aging & Wellness Institute in Clearwater, FL-Alan Gassman presents: Estate Planning 101

8/19/2019-FICPA Sandspur Chapter Meeting at TGI Fridays in Tampa, FL-Alan Gassman and Brandon Ketron present: Tax Planning With Real Estate Under Section 199A and More AND The Florida CPA's Guide to Creditor Protection for Your Clients from 5 PM to 7 PM ET

Planning Now for Probable and Possible Trump Tax Law Changes, Alan Gassman with Kenneth Crotty, Esq., Christopher Denicolo, Esq., and Brandon Ketron, Esq., The Florida Bar, June 7,2017.

Trust Planning from A to Z, Florida Institute of Certified Public Accountants, January 26, 2015.

“Alan Gassman and Brandon Ketron on 199(A) Planning Opportunities for Businesses, Professional Practices and Their Owners”, with Brandon Ketron, Esq., FICPA Joint Chapter Meeting (Hillsborough, Pinellas, West Coast and Suncoast Chapters), Clearwater, Florida, June 2018.

"Creditor Protection Planning for Business and Investment Entities and Their Owners-Including 7 Strategies You Didn't Know About", The Florida Bar Annual Wealth Protection Seminar, Tampa, Florida, May 2018.

"Creative Planning Opportunities, including 199(A) Aspects of the New Tax Law", presented with Kevin Sutton, Cohen and Grieb CPA's Conference, Tampa, Florida, May 2018.

"Asset Protection for the Everyday Estate Planning Lawyer: A Nuts to Bolts Review of Asset Protection Techniques from Simple to Complex", 5th Annual Ave Maria School of Law Estate Planning Conference, Naples, Florida, April 2018.

"The Business of Legal and Personal Relationships: The Good, The Bad, and The Ugly", Stetson Law School, Gulfport, Florida, March 2018.

"Asset Protection for Business Owners and Their Entities", Estate Planning Council of Greater Miami, 6th Annual Estate Planning Symposium, Coral Gables, Florida, February 2018.

"Trust Planning From A To Z", with Kenneth Crotty, Esq., Christopher Denicolo, Esq., and Brandon Ketron, FICPA-Sandspur Chapter, Tampa, Florida, February 2018.

"Creative Planning With Flow Through Entities Including 199(A) New Ideas", with Kenneth Crotty, Esq., Christopher Denicolo, Esq., and Brandon Ketron, FICPA-Sandspur Chapter, Tampa, Florida, February 2018.

"What to Remember About 199A", All Children's Hospital 20th Annual Estate, Tax, Legal & Financial Planning Seminar, St. Petersburg, Florida, February 2018.

"Dentists are Different – Practical, Business, Tax, Regulatory and Common Forms and Language Used in the Representation of Dentists and Practices", Florida Bar, Representing the Physician, February 2018

"The Biggest Estate Planning Mistakes", Steward Partners Global Advisory, Clearwater, Florida, November 2017.

"Trust and Estate Planning with IRA and Pension Benefits – and Related Topics!", 2017 XXVI Success Event, The Estate Planning Council of Naples, Naples, Florida, October 2017.

"Dynamic Estate and Tax Planning – With Recent Developments", 2017 XXVI Success Event, The Estate Planning Council of Naples, Naples, Florida, October 2017.

"Asset Protection Strategies & Issues You May Not Have Thought Of – With Recent Developments.", 2017 XXVI Success Event, The Estate Planning Council of Naples, Naples, Florida, October 2017.

“Asset Protection for Businesses and Their Owners”, The Jewish Federation of Sarasota-Manatee, Sarasota, Florida, October 2017.

“Hot Topics in Estate Planning”, The Jewish Federation of Sarasota-Manatee, Sarasota, Florida, October 2017.

“Dynamic Estate Planning and Asset Protection Strategies for the Conscientious Planner, with Discussion of Recent Events”, with Brandon Ketron, Esq., New Port Richey Charitable Consortium, New Port Richey, Florida, September 2017.

“Asset Protection Opportunities You May Not Know About”, Estate Planning Council of Northeast Florida, Jacksonville, Florida, September 2017.

“Dynamic Trust Planning”, FICPA Conference, Ft. Lauderdale, Florida, September 2017.

“Asset Protection from A to Z”, FICPA Sandspur Chapter, Tampa, Florida, June 2017.

“Essential Creditor Protection and Retirement Planning Considerations”, All Children’s Hospital Leadership Executive Academic Development (LEAD) Conference, St. Petersburg, Florida, May 2017.

“Florida Creditor Exemption Law Planning Update”, Florida Bar Annual Wealth Protection Seminar, Miami, Florida, April 2017.

“Florida Creditor Exemption Law Planning Update”, Southwest Florida STEP (Chapter Meeting), Naples, Florida, April 2017.

“Estate Planning Process – A Talk with Alan Gassman”, Florida State University, March 2017.

“Recent Developments and Strategies for Estate Planners”, All Children’s Hospital 19th Annual Estate, Tax, Legal & Financial Planning Seminar, with Kenneth Crotty, Esq., Christopher Denicolo, Esq., Brandon Ketron, Esq., Edwin Morrow, III, Esq., St. Petersburg, Florida, February 2017.

“Joint Exempt Step-Up Trust (JEST) Planning – We Are Not Joking!”, South Palm Beach County Bar Association, Boca Raton, Florida, February 2017.

“Essential Planning for Small Firms & Solos: Entity Formation, Asset Protection & Succession”, West Pasco Bar Association, New Port Richey, Florida, January 2017.

“The Essential Guide to Money, Creditor Protection, Investments, Trusts and Business Law for New Physicians - - How to Have Great Success or Almost Certain Failure”, HCA/Largo Medical Center, Largo, Florida, December 2016.

“Estate, Medical Practice, Retirement, Tax, Insurance, and Buy/Sell Planning: The Earlier You Start the Sooner You Will Be Secure”, The MOTE Vascular Foundation, Inc., “Building a Successful Vascular Practice” Seminar, Sarasota, Florida, October 2016.

"Practical and Innovative Planning to Avoid and Manage Estate and Trust Disputes", 58th Annual Trust and Wealth Management Conference, Sarasota, Florida, September 2016.

"An Overview of the Ethical and Regulatory Issues for Substance Abuse and Mental Health Providers", with Lester Perling, Esq; Florida's Premier Behavioral Health Annual Conference – Florida Alcohol & Drug Abuse Association, Orlando, Florida, August 2016.

"Practical Planning for Married and Unmarried Couples", Ameriprise Financial "Plan for the Future" Seminar, Safety Harbor, Florida, August 2016.

"Coffee with Alan: An Introduction to Select Estate Planning and Asset Protection Strategies", 3rd Annual Ave Maria School of Law Estate Planning Conference, Naples, Florida, May 2016.

Essential Planning for Small Firms & Solos: Entity Formalities, Asset Protection & Succession", Clearwater, Florida, May 10, 2016.

"Estate Planning Structures and Strategies-There Is More On The Menu Than You Think", The Florida Bar – 2016 Annual Wealth Protection Conference, Miami, Florida, April 2016.

"Creditor Protection for the Medical Practice", The Florida Bar – Representing the Physician, Orlando, Florida, January 2016.

"Gun Trusts and Florida Law Update", InterActive Legal at Heckerling Institute, Orlando, Florida, January 2016.

"Essential Creditor Protection and Retirement Planning Considerations", Medical Education Resources (MER), Key West, Florida, January 2016.

"Planning for Ownership and Inheritance of Pension and IRA Accounts and Benefits", Tampa Bay Estate Planning Council, January 2015.

"Using Estate Planning Techniques to Optimize Family Wealth Preservation", Ave Maria Law School, Estate Planning Conference, April 2014.

"Planning for Same Sex Couples with a Discussion on Creditor Protection", Wealth Counsel Florida Forum, Orlando, Florida, March, 2014.

"Using Estate Planning Techniques to Optimize Family Wealth Preservation", The Florida Bar Annual Wealth Protection Seminar, Miami, Florida, May 2013.

"The 10 Biggest Mistakes that Physicians Make in their Investments and Business Planning" and "50 Ways to Leave Your Overhead- How to Enhance Medical Practice Profitability", Medical Economic Resources Seminar, July 2013.

"Around the World in an Hour: Essential Legal, Business, Asset Protection, and Estate Planning Concepts that Every Doctor Must Know", St. Pete General Seminar, St. Petersburg, Florida, February 2013.

"Avoiding Disaster in the Sunshine State- Tricks, Traps, and Nuances that Make Florida Planning Interesting and Unique", All Children's Hospital- 15th Annual Estate, Tax, Legal, and Financial Planning Seminar, St. Petersburg, Florida, February 2013.

"An Update on Estate Planning- New Tricks and New Traps", Estate Planning Council of Manatee County, Florida, February 2012.

"New Developments with Respect to Individual Creditor Protection for Doctors (and Lawyers)", The Florida Bar- Representing the Physician, January 2012.

"Exemption and Debtor Rights Planning for the Floridian: Issues, Strategies and Planning Considerations", The Florida Bar Wealth Preservation Conference, Miami, Florida, May 2010.

"Individual and Group Medical Practices: Tax, Health Law, and Creditor Protection Planning", BNA Tax & Accounting, March 2010.

"Protecting Business and Investments with Effective Planning", The Florida Bar Wealth Preservation Conference, Miami, Florida, May 2009.

"The Nuts and Bolts of How to Structure Individual and Group Medical Practice Entities", The Florida Bar - Representing the Physician, January 2009.

"Creditor Planning Under The New Trust Code", The Florida Bar Wealth Preservation Conference, Miami, Florida, May 2008.

"Florida Creditor Exemption Planning", The Florida Bar Wealth Preservation Conference, Miami, Florida, May 2008.

"How Our Trusts Are Different Than They Were Two Years Ago", All Children's Hospital Foundation, St. Petersburg, Florida, February 2008.

"Asset Protection Planning - Hot Topics and Essential Information for the Estate Planner", Northwest Florida Estate Planning Council, 2006.

"Annual Wealth Protection 2006, The Hot Topics in Asset Protection Planning; Exemptions and Immunities Now More Important Than Ever", 2006.

"How To Put Together Protection Systems That Work: Strategic Planning With Wealth Protection Systems", The Florida Bar, Miami, Florida, 2005.

"Estate Tax Planning: Hot Topics and Recent Developments", Suncoast Chapter of the FICPA, 2004.

"Asset Protection for Physicians and Medical Practices", Annual Florida Bar Taxation Health Law Seminar, Miami, Florida, 2004.

"An Asset Protection Lawyer Looks at 40 (Asset Protection Techniques)", The Florida Bar Tax Section of Wealth Preservation, Miami, Florida, 2004; Sarasota Bar Association, 2004.

“What Every Doctor Should Know”, Hernando County Medical Society, April 1, 2001, Spring Hill, Florida, and Marion County Medical Society, Ocala, Florida, September 2002.

“Limited Liabilities and LLCs, a Practice Guide for Estate Planners”, The Florida Bar CLE Elder Law Seminar, Tampa, Florida, 2001.

CPA ACADEMY WEBINARS

10/15/2021 - CPA Academy - THE MATHEMATICS OF ESTATE TAX PLANNING AND MORE (PART 3)

9/24/2021 - CPA Academy - Estate Tax Planning - Use It Before You Lose It (Gassman and Ketron)

8/18/2021 - CPA Academy - Part 2 Mathematics of Estate Tax Planning (Gassman & Ketron)

7/19/2021 - CPA Academy - ASSET PROTECTION MEETS ESTATE TAX PLANNING

7/06/2021 - CPA Academy - The Mathematics of Estate Tax Planning and More

5/26/21 - CPA Academy - Hot Topics for Estate Tax Planners

5/11/21 - CPA Academy - The Mathematics of Estate Tax Planning

4/30/21 - CPA Academy - SLAT Spouse Limited Asset Trusts

4/6/2021 - CPA Academy - Alan Gassman and Brandon Ketron present: Estate Tax Planning Today for What May Happen Tomorrow from 5:30 to 6:20 PM EDT

3/23/2021 - CPA Academy - Alan Gassman and Brandon Ketron EMPLOYEE RETENTION CREDIT CHANGES, RESTAURANT REVITALIZATION, & SHUTTERED VENUES from 5:30 to 6:30 PM

3/12/2021 - CPA Academy - Alan Gassman and Brandon Ketron present: PPP & ERC: MARCH 1ST UPDATES FROM THE IRS, AND MORE from 1 to 3 PM EST

2/3/2021 - CPA Academy - Alan Gassman and Michael Lehmann present: Establishing 501(c)(3) Organizations and the Form 1023 from 5:30 to 6:30 PM

2/4/2021 - CPA Academy - Alan Gassman and Brandon Ketron present: THE CPAS GUIDE TO THE EMPLOYEE RETENTION CREDIT from 3 to 4 PM

EST

2/5/2021 - CPA Academy - Alan Gassman and Brandon Ketron present: THE CPAS GUIDE TO THE HHS PROVIDER RELIEF FUND from 4 to 5 PM EST

1/26/2021 - CPA Academy - Alan Gassman and Brandon Ketron present: PPP & EIDL RULES FOR CHARITIES & NON-PROFITS from 5:30 to 6:30 PM EST

1/27/2021 - CPA Academy - Alan Gassman and Brandon Ketron present: IN DEPTH VIEW OF JANUARY 19TH SBA GUIDANCE, PPP SECOND DRAW APPLICATION & NEW CONSIDERATIONS from 5:30 to 7 PM EST

1/19/2021 - CPA Academy - Alan Gassman, Jerry Hesch, Michael Lehmann & Brandon Ketron present: Charitable Planning Series Finale - Putting It All Together With Real Life Examples from 5:30 to 6:30 PM EST

1/12/2021 - CPA Academy - Alan Gassman, Jerry Hesch, Michael Lehmann & Brandon Ketron present: CLAT Planning from 5:30 to 6:30 PM EST

1/14/2021 - CPA Academy - Alan Gassman and Brandon Ketron present: JANUARY 6TH SBA IFRS CLARIFY PPP, EIDL AND OTHER PROGRAMS from 2:30 to 4

1/5/2021 - CPA Academy - Alan Gassman, Jerry Hesch & Brandon Ketron present: CRUT Planning from 5:30 to 6:30 PM EST

1/9/2021 - CPA Academy - Alan Gassman and Brandon Ketron present: JANUARY 6TH SBA IFRS CLARIFY PPP, EIDL AND OTHER PROGRAMS from 11 AM to 12:30 PM EST

12/28/2020 - CPA Academy - Alan Gassman and Brandon Ketron present: PPP AND EIDL PLANNING FOR BUSINESSES AND INDEPENDENT CONTRACTORS from 9:30 to 11 AM EST

12/28/2020 - CPA Academy - Alan Gassman, Jerry Hesch & Brandon Ketron present: Dynamic And Creative Charitable Planning (Part 2) - What You Wish You Had Known Before from 5:30 to 6:30 PM EST

12/30/2020 - CPA Academy - Alan Gassman and Brandon Ketron present: PPP AND EIDL PLANNING FOR BUSINESSES AND INDEPENDENT CONTRACTORS - EXTENDED from 11 AM to 1 PM EST

12/21/2020 - CPA Academy - Alan Gassman, Jerry Hesch & Brandon Ketron present: Dynamic And Creative Charitable Planning - What You Wish You Had Known Before (Part 1) from 5:30 to 6:30 PM EST

12/7/2020 - CPA Academy - Alan Gassman and Brandon Ketron present: TAX PLANNING WITH PPP LOANS AFTER REV. RUL. 2020-27 & REV. PROC. 2020-51 from 5:30 to 7 PM EST

12/14/2020 - CPA Academy - Alan Gassman and Leslie Share present: U.S. INTERNATIONAL TAX AND COMPLIANCE UPDATE from 5:30 to 6:30 PM EST

11/11/2020 - CPA Academy - Alan Gassman and Brandon Ketron present: Hot Topics For Post - Election Planning from 5:30 to 6:30 PM EST

10/27/2020 - CPA Academy - Alan Gassman and Christopher Denicolo present Tax Planning For Insolvency and the Discharge of Indebtedness Part 2 with Creditor Protection Planning from 5:30 to 6:30 PM EDT

10/20/2020 - CPA Academy - Alan Gassman and Christopher Denicolo present Tax Planning For Insolvency and the Discharge of Indebtedness Part 1 from 5:30 to 6:30 PM EDT

10/19/2020 - CPA Academy - Alan Gassman, Brandon Ketron and Kevin Cameron present: PPP Update - Tax, Forgiveness and Transfer Planning, Including for Loans Under $50,000 from 11 to 12 PM EDT

10/9/2020 - CPA Academy - Alan Gassman, Brandon Ketron and Kevin Cameron present: Critical Planning with PPP Borrower Entities after Notice 5000-20057 - Important Tax, Estate and Transactional Planning Issues from 12 to 1 PM EDT

10/6/2020 - CPA Academy - Alan Gassman and Sean Healy present: Lethal Pitfalls In Drafting Gun Trusts from 5:30 to 6:30 PM EDT

9/14/2020 - CPA Academy - Alan Gassman presents: The Biden 2-Step - Estate Tax Avoidance for High Net Worth Taxpayers from 5:30 to 6:30 PM EDT

9/15/2020 - CPA Academy - Alan Gassman presents: My Favorite Original Estate Planning Creations (the JEST, the SCGRAT, the Tea Pot Trust, and EstateView Software) from 5:30 to 6:30 PM EDT

9/16/2020 - CPA Academy - Alan Gassman presents: Professional Success Strategies: Part 2 from 5:30 to 6:30 PM EDT

8/11/2020 - CPA Academy - Alan Gassman, Brandon Ketron and Kevin Cameron present PPP ROUND 2: INSIGHTS FROM THE RUBIO-COLLINS BILL from 10 to 11 AM EDT

8/11/2020 - CPA Academy - Alan Gassman and Christopher Denicolo present: Installment Sale To A Defective Grantor Trust from 5:30 to 6:30 PM EDT

8/10/2020 - CPA Academy - Alan Gassman and Ken Crotty present: Estate Planning Math - It's All In The Numbers from 5:30 to 6:30 PM EDT

8/7/2020 - CPA Academy - Alan Gassman and Brandon Ketron present: HOW THE PPP RULES CHANGED AFTER THE AUGUST 4TH SBA FAQS from 3:30 to 4:30 PM EDT.

7/17/2020 - CPA Academy - Alan Gassman presents: Dynamic Planning for Professionals and Their Entities from 10 am to 11 am et

6/29/2020 - CPA Academy - Alan Gassman presents: Creditor Protection For Your Best Clients from 5 to 6 PM ET

6/25/2020 - CPA Academy - Alan Gassman presents: CPAs Guide To Bankruptcy from 9 to 10 AM ET

6/22/2020 - CPA Academy - Alan Gassman, Brandon Ketron and Kevin Cameron present: Spreadsheeting for PPP from 9 to 10 AM ET

6/23/2020 - CPA Academy - Alan Gassman and Brandon Ketron present: More Real Estate Strategies For The Age Of Covid-19 -- What Your Best Clients Need To Know And Do - (PART 2) from 9 to 10 AM ET

6/18/2020 - CPA Academy - Alan Brandon and Kevin present: IMPORTANT PPP DEVELOPMENTS POST JUNE 5TH - Stump The Panel from 9 to 10 AM ET

6/19/2020 - CPA Academy - Alan Gassman, Brandon Ketron and Kevin Cameron present: PPP Breaking News Update - EZ Application, Independent Contractors, And Much More from 9 to 10 AM ET

6/12/2020 - CPA Academy - Alan Gassman presents: Real Estate Strategies For The Age Of Covid-19 -- What Your Best Clients Need To Know And Do - (PART 1) from 9 to 10 AM ET
6/15/2020 - CPA Academy - Alan Gassman presents: The Essentials Of Physician Planning - Asset Protection And Practice Strategies from 5 to 6 PM ET

6/5/2020 - CPA Academy - Alan Gassman and Colleen Flynn present: REHIRING RISKS AND PRACTICES: IMPORTANT ISSUES FOR EMPLOYERS AND PPP ISSUES WILL PLAINTIFF LAWYER CLAIMS BE WORSE THAN THE VIRUS? PROTECTING YOUR PRACTICE OR BUSINESS IN THE REHIRE AND ADMINISTRATION OF LEAVE PROCESS from 10 AM to 11 AM ET

5/29/2020 - CPA Academy - Alan Gassman presents: Hot Topics Call For Creative Solutions from 9 AM to 10 AM ET

6/1/2020 - CPA Academy - Alan Gassman presents: Planning For Your Best Clients During The Coronavirus Crisis from 9 AM to 10 AM ET

5/28/2020 - CPA Academy - Alan and Brandon present: PPP LOAN FORGIVENESS APPLICATION: EFFECTIVE PLANNING AND CLIENT COMMUNICATION from 10 AM to 11 AM ET

LEIMBERG INFORMATION SERVICES WEBINARS:

8/27/2024 - Leimberg Webinar Services (LISI) Alan Gassman presents: **Designing Your Meal at the SLAT-O-Teria - Different Kinds of SLATs and How They Can Be Designed, Drafted and Implemented - With Sample Clauses and Client Explanation Letters**

8/15/2024 - Leimberg Webinar Services (LISI) Alan Gassman presents: **Governor DeSantis Signs Bill Impacting SLATs In Florida: What It All Means, Including Sample Language, Charts & More! - A Special Re-Broadcast**

8/14/2024 - Leimberg Webinar Services (LISI) Alan Gassman and Christopher Denicolo presents: **Why Our Trusts Are Different Than All Other Trusts: Documents Included - A SPECIAL RE-BROADCAST**

8/13/2024 - Leimberg Webinar Services (LISI) Alan Gassman, Bob Keebler & Martin Shenkman presents: **Corporate Transparency Act: A Guide for Legal and Financial Professionals, Including an Overview of CPA Liability for Unauthorized Practice of the Law**

8/13/2024 - Leimberg Webinar Services (LISI) Alan Gassman, Hesch & Ketron presents: **What The CRUT? Is It Time to Put One Up? - A Special Re-Broadcast**

8/8/2024 - Leimberg Webinar Services (LISI) Alan Gassman presents: **Estate Tax Planning Techniques - A Whirlwind Tour**

8/8/2024 - Leimberg Webinar Services (LISI) Alan Gassman, John Beck & Michael Lehmann presents: **Donor Controlled Charitable Business Entities: How Charitable Business and Investment Taxpayers Can Donate Now and Manage and Control Entities During Their Lifetimes, aka What Paul Newman Didn't Know About Charitable Giving**

8/7/2024 - Leimberg Webinar Services (LISI) Alan Gassman, Bob Keebler presents: **Planning Now For the 2026 CLIFF**

8/2/2024 - Leimberg Webinar Services (LISI) Alan Gassman presents: **The Countdown to 2026: Designing, Presenting, and Implementing Large Transfers for Clients While Avoiding Donor’s Remorse and Malpractice Lawsuits**

8/1/2024 - Leimberg Webinar Services (LISI) Alan Gassman & Paul Hood presents:The Countdown to 2026: **Designing, Presenting, and Implementing Large Transfers for Clients While Avoiding Donor’s Remorse and Malpractice Lawsuits**

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7/3/2024 - Leimberg Webinar Services (LISI) Alan Gassman & Jonathan Blattmachr presents: **FLORIDA SNOWBIRD PLANNING When and How to Use Florida, New York and APT Jurisdiction Trusts**

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5/8/2024 - Leimberg Webinar Services (LISI) Alan Gassman presents: **Alan Gassman's Guide To What You Must Know About Florida Community Property Trusts - A Special Rebroadcast**

4/30/2024 - Leimberg Webinar Services (LISI) Alan Gassman & Paul Hood presents: **Running the Numbers on CRATs, CRUTs, NIMCRUTs, Life Estate and Remainder Interests and Qualified Charitable Distributions (QCDs) from IRAs - Part 4 of a 4 Part Series**

4/24/2024 - Leimberg Webinar Services (LISI) Alan Gassman & Paul Hood Presents: **Running the Numbers on QPRT's and GRAT's- Part 3 of a 4 Part Series**

4/17/2024 - Leimberg Webinar Services (LISI) Alan Gassman & Paul Hood Presents: **Running the Numbers on Charitable Lead Annuity Trusts - Part 2 of a 4 Part Series**

4/12/2024 - Leimberg Webinar Services (LISI) Alan Gassman & William Prescott presents: **Dentists Are Different**

4/11/2024 - Leimberg Webinar Services (LISI) Alan Gassman, Jerry Hesch and Brandon Ketron presents: **What The CRUT? Is It Time to Put One Up? - A Special Re-Broadcast**

4/11/2024 - Leimberg Webinar Services (LISI) Alan Gassman & Martin Shenkman presents: **Corporate Transparency Act: Practical Considerations Practitioners Must Know**

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3/37/2024 - Leimberg Webinar Services (LISI) Alan Gassman presents: **Estate and Basis Planning with Joint Trusts, Including the JEST (Joint Exempt Step-Up Trust)**

3/14/2024 - Leimberg Webinar Services (LISI) Alan Gassman, Jonathan Blattmachr, Martin Shenkman & Chriseanna Mitchelle presents: **Breaking News: CTA Unconstitutional But Only For Plaintiffs So you Still have To File**

3/9/2024 - Leimberg Webinar Services (LISI) Alan Gassman presents: **The Countdown to 2026: Designing, Presenting, and Implementing Large Transfers for Clients While Avoiding Donor's Remorse and Malpractice Lawsuits**

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2/9/2024 - Leimberg Webinar Services (LISI) Alan Gassman & Brandon Ketron presents: **What Advisors Need To Know About The New Employee Retention Credit Volutary Disclosure Program**

2/8/2024 - Leimberg Webinar Services (LISI) Alan Gassman, Jerry Hesch & Brandon Ketron presents: **What The CRUT? Is It Time to Put One Up? - A Special Re-Broadcast**

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1/8/2024 - Leimberg Webinar Services (LISI) Alan Gassman Jonathan Blattmachr, Bob Keebler & Martin Shenkman presents: **Understanding Wyden's Just Released Blueprint for Taxing the Wealthy**

12/27/2023 - Leimberg Webinar Services (LISI) Alan Gassman & Martin Shenkman presents: **Corporate Transparency Act: Practical Considerations Practitioners Must Know A Special Re-Broadcast**

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11/28/2023- Leimberg Webinar Services (LISI) Alan Gassman & Brandon Ketron presents: **ERC Borrowers In Crisis: Attorney/Client Privilege, Procedures and Most Common Rules That Were Broken, Causing IR-2023-169 and Subsequent Notices**

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Procedures and Most Common Rules That Were Broken, Causing IR-2023-169 and Subsequent Notices

11/9/2023- Leimberg Webinar Services (LISI) Alan Gassman presents: **IF IT IS THURSDAY, I MUST BE IN HAWAII – Even More Things You Have to Think About – AKA Opportunities for Success**

11/3/2023- Leimberg Webinar Services (LISI) Alan Gassman & Ketron presents: **ERC Borrowers In Crisis Attorney Client Privilege, Procedures and Most Common Rules That Were Broken…**

11/3/2023- Leimberg Webinar Services (LISI) Alan Gassman & Brandon Ketron presents: **ERC Borrowers In Crisis: Attorney/Client Privilege, Procedures and Most Common Rules That Were Broken, Causing IR-2023-169 and Subsequent Notices**

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6/23/2023- Leimberg Webinar Services (LISI) Alan Gassman & Christoper Denicolo presents: **WHY OUR TRUSTS ARE DIFFERENT THAN ALL OTHER TRUSTS: DOCUMENTS INCLUDED - A SPECIAL RE-BROADCAST**

6/20/2023- Leimberg Webinar Services (LISI) Alan Gassman, Ken Crotty, Chris Denicolo, Brandon Ketron, & John Beck presents: **The Fabulous Florida Planning Twelve Pack - A 12 Part Series**

5/25/2023- Leimberg Webinar Services (LISI) Alan Gassman, Jonathan Blattmachr, Robert Keebler, & Martin Shenkman presents: **A First Look at the Radical Estate Tax Changes Contained in the Biden 2024 Budget: Urgent Impact on High Net Worth Families**

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5/15/2023- Leimberg Webinar Services (LISI) Alan Gassman & Paul Hood presents: **Paul Hood: Do the Assets Inside a Grantor Trust Receive a New Fair Market Value By Virtue of the Grantor's Death, Even Though Those Assets Aren't Includible in the Grantor's Estate After Rev. Rul. 2023-2?**

5/4/2023- Leimberg Webinar Services (LISI) Alan Gassman presents: **Creative and Dynamic Charitable Planning Techniques - What You Do Not Know Can Hurt Your Client - A Special Re-Broadcast**

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4/18/2023- Leimberg Webinar Services (LISI) Alan Gassman presents: **Asset Protection Opportunities You May Not Know About - A Special Re-Broadcast**

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3/15/2023- Leimberg Webinar Services (LISI) Alan Gassman presents: **Planning After Secure 2.0: New IRA distribution planning rules, 529 to Roth, Charitable Remainder Trust & Annuity Planning with IRA's, QLAC planning to reduce minimum distributions, new planning rules for disabled beneficiaries, and more**

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2/16/2023- Leimberg Webinar Services (LISI) Alan Gassman presents: **Designing Your Meal at the SLAT-O-Teria - Different Kinds of SLATs and How They Can Be Designed, Drafted and Implemented - With Sample Clauses and Client Explanation Letters**

2/15/2023- Leimberg Webinar Services (LISI) Alan Gassman presents: **Recording – Designing Your Meal and the SLAT-O-Teria – Different Kinds of SLATs and How They Can be Designed, Drafted and Implemented – With Sample Clauses and Client Explanation Letters**

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1/23/2024- Leimberg Webinar Services (LISI) Alan Gassman & Brandon Ketron presents: **Planning After Secure 2.0: New IRA distribution planning rules, 529 to Roth, Charitable Remainder Trust & Annuity Planning with IRA's, QLAC planning to reduce minimum distributions, new planning rules for disabled beneficiaries, and more**

1/20/2023- Leimberg Webinar Services (LISI) Alan Gassman & Brandon Ketron presents: **Planning After Secure 2.0: New IRA distribution planning rules, 529 to Roth, Charitable Remainder Trust & Annuity Planning with IRA's, QLAC planning to reduce minimum distributions, new planning rules for disabled beneficiaries, and more**

1/18/2023- Leimberg Webinar Services (LISI) Alan Gassman & Ketron presents: **Planning for After Secure 2.0**

1/18.2023- Leimberg Webinar Services (LISI) Alan Gassman & Brandon Ketron presents: **Planning After Secure 2.0: New IRA distribution planning rules, 529 to Roth, Charitable Remainder Trust & Annuity Planning with IRA's, QLAC planning to reduce minimum distributions, new planning rules for disabled beneficiaries, and more**

1/14/2023- Leimberg Webinar Services (LISI) Alan Gassman presents: **Saturday - Asset Protection From A to Z - Part 2**

1/5/2023- Leimberg Webinar Services (LISI) Alan Gassman, Martin Shenkman & Brandon Ketron presents: **Clawback Regs - Practical Response to the Proposed Regs - and What to Tell Clients - A special Re-Broadcast**

12/21/2021- Leimberg Webinar Services (LISI) Alan Gassman & Brandon Ketron presents: **The Biden 3rd-Step What to Do With Your Year-End Promissory Note**

11/5/2021 - Leimberg Webinar Services (LISI) **Florida Snowbird Planning When and How to Use Florida, New York and APT Jurisdiction Trusts**

11/4/2021 - Leimberg Webinar Services (LISI) **Picking Up the Pieces and Seizing Upon Opportunities - Essential Knowledge and Strategies for Now and Year End Planning in View of Legislative Changes or Not**

9/22/2021-Leimberg Webinar Services (LISI) **Alan Gassman Brandon Ketron Estate Tax and Related Planning for Wealthy Clients in View of the House Ways and Means Committee Proposed Legislation**

8/20/2021-Leimberg Webinar Services (LISI) **Kenneth DeGraw Christopher Lucas Elizabeth Woodward Alan S. Gassman Representing the Distressed Business: What the Sophisticated Advisor Needs to Know**

8/12/2021-Leimberg Webinar Services (LISI) **Alan Gassman and Brandon Ketron PPP and Employee Retention Credit (ERC) Update - What the Sophisticated Advisors Needs To Know about the SBA and IRS's Recently Issued Guidance**

7/9/2021-Leimberg Webinar Services (LISI) **Alan Gassman and Christopher Denicolo present: Florida (and Other) Community Property Trusts The Right Solution For Many, But Not For All 1:00 PM to 2:30 PM EDT**

5/13/2021-Leimberg Webinar Services (LISI)- **Alan Gassman, Brandon Ketron, and Christopher Denicolo present: Spousal Limited Access Trusts - Going to Bat with your SLAT 8:30 AM to 10:00 AM EDT**

4/1/2021-Leimberg Webinar Services (LISI)-**Alan Gassman, Jerry Hesch and Brandon Ketron presents: ESTATE TAX PLANNING WHILE THERE IS TIME: HOW TO PLAN, EXPLAIN AND IMPLEMENT EFFECTIVE ESTATE TAX PLANNING BEFORE AND AFTER ENACTMENT OF A SANDERS OR OTHER PLAN 2:00 PM to 3:30 PM EDT**

3/10/2021-Leimberg Webinar Services (LISI)-**Alan Gassman and Brandon Ketron present: PPP and Employee Retention Credit (ERC) Update - What is New and What is Still to Come from 1:00 PM to 2:30 PM EDT**

1/26/2021-Leimberg Webinar Services (LISI)-**Alan Gassman and Brandon Ketron present: PPP and EIDL Loan Rules Update and Review from 3 to 4:30 PM EST**

1/21/2021-Leimberg Webinar Services (LISI)-**Alan Gassman and Brandon Ketron present: What You Need to Know About the Employee Retention Credit, HHS Provider Relief Reporting Requirements and PPP and EIDL Questions from 1:00 PM to 2:30 PM EST**

1/12/2021-Leimberg Webinar Services (LISI)-**Alan Gassman and Brandon Ketron present: SBA EXPLANATION OF NEW CARES ACT CHANGES FOR PPP, EIDL AND OTHER PROGRAMS: WHAT ADVISORS NEED TO KNOW NOW! From 1 to 2:30 PM EST**

12/23/2020-Leimberg Webinar Services (LISI)-**Alan and Brandon present: The Coronavirus Relief Bill & PPP Deductibility: What We Will Have As a Result of the New Legislation? From 3:30 to 4:45 PM EST**

12/4/2020-Leimberg Webinar Services (LISI)-**Jerry Hesch, Alan Gassman and Brandon Ketron present: What The CRUT? Is It Time to Put One Up? From 1 to 2:30 PM EST**

12/3/2020-Leimberg Webinar Services (LISI)-**Alan Gassman, Brandon Ketron and Jerry Hesch present: PPP BORROWER TAX PLANNING---AVOIDING DISASTER AT THE INTERSECTION OF HWY 265 AND THE PPP EXPRESSWAY AFTER REVENUE RULING 2020-27 AND REVENUE PROCEDURE 2020-51 WHETHER AND WHEN TO DEDUCT, AND HOW TO HANDLE ASSOCIATED ISSUES from 3 to 4:30 PM EST**

11/30/2020-Leimberg Webinar Services (LISI)-**Alan Gassman, Brandon Ketron and Michael Lehmann present: GIVING APPRECIATED ASSETS TO CHARITY AND OTHER OPPORTUNITIES: Technical Rules that Provide Solid Tax and Practical Opportunities for Taxpayers and their Charities and Family Members from 3 to 4:30 PM EST**

11/18/2020-Leimberg Webinar Services (LISI)-**Alan Gassman and Jerry Hesch present: The Year-End CLAT: Where Is Your Client At? from 3 to 4:30 PM EST**

11/19/2020-Leimberg Webinar Services (LISI)-**Alan Gassman, Brandon Ketron and Michael Lehmann present: Tax Smart and Innovative Year End and Lifetime Charitable Planning from 1 to 2:30 PM EST**

10/28/2020-Leimberg Webinar Services (LISI)-**Alan Gassman and Brandon Ketron present: DYNAMIC AND CREATIVE STRATEGIES FOR 2020 YEAR END PLANNING from 3 to 4:30 PM EDT**

10/23/2020-Leimberg Webinar Services (LISI)-**Alan Gassman and Christopher Denicolo present: Tax Planning for Insolvency and the Discharge of Indebtedness: What Business & Tax Planning Professionals Can Do to Reduce Taxes and Avoid Unpleasant Surprises from 1 to 2:30 PM EDT**

10/9/2020-Leimberg Webinar Services (LISI)**-Alan Gassman, Brandon Ketron and Kevin Cameron present: Critical Planning with PPP Borrower Entities after Notice 5000-20057 - Important Tax, Estate and Transactional Planning Issues from 11 to 12:30 PM EDT**

10/8/2020-Leimberg Webinar Services (LISI)-**Alan Colleen present: Pitfalls for Employers to Avoid when Reopening or Returning Workers to the Office During COVID-19 from 3-430pm edt**

8/18/2020-Leimberg Webinar Services (LISI)-**Alan Gassman, Jerry Hesch and Martin Shenkman present: The Biden 2-Step PLUS Martin Shenkman's Review of Topics and Planning Opportunities from the 46th Notre Dame Tax and Estate Planning Institute from 3 to 4PM EDT**

8/6/2020-Leimberg Webinar Services (LISI)-**Alan Gassman, Brandon Ketron and Kevin Cameron present: PPP and EIDL UPDATE: NEW LOAN OPPORTUNITIES, ADDED QUALIFIED EXPENDITURES, HOW TO HANDLE REDUCTIONS IN WORKFORCE & UPDATE ON RUBIO-COLLINS BILL from 3 to 4:30 PM EDT**

7/2/2020-Leimberg Webinar Services (LISI)-**Alan Gassman, Brandon Ketron and Kevin Cameron present: PPP Loan Update - SBA New June 22 Interim Final Rules Pave the Way to Mid Period Forgiveness and More-- Time to Apply for Forgiveness! From 3 PM to 4:30 PM EDT**

6/26/2020-Leimberg Webinar Services (LISI)-**Alan Gassman, Christopher Denicolo and Brandon Ketron present: IRA AND RETIREMENT PLANNING UNDER THE CARES ACT, INCLUDING IRS NOTICE 2020-50 AND WHAT YOU NEED TO KNOW FOR SMALL BUSINESS PLANNING from 3 PM to 4:30 PM ET**

6/19/2020-Leimberg Webinar Services (LISI)-**Alan Gassman, Brandon Ketron and Kevin Cameron present: Essential PPP and EIDL Loan Update - - What's Happened Since June 5th, and Answers to the Hardest Questions from 1 to 2:30 PM ET**

6/3/2020-Leimberg Webinar Services (LISI)-**Alan Gassman, Brandon Ketron and Kevin Cameron present: Get Your PHD in PPP, Including an Important Update on What Congress is Doing from 1 PM to 3 PM ET**

5/26/2020-Leimberg Webinar Services (LISI)-**Alan Gassman and Brandon Ketron and Kevin Cameron present: MAXIMIZING PPP LOAN FORGIVENESS AFTER THE NEW SBA INTERIM FINAL RULES ISSUED MAY 22ND - TIPS, TRICKS AND STRATEGIES FOR CPAS, LAW FIRMS AND OTHER ADVISORS TO SURVIVE AND THRIVE DURING THIS CRISIS. INCLUDES 30 MINUTES OF QUESTIONS AND ANSWERS from 11:30 AM to 1 PM EDT**

5/19/2020-Leimberg Webinar Services (LISI)-**Alan Gassman and Brandon Ketron present: PPP LOAN FORGIVENESS UNDER NEWLY RELEASED PPP LOAN FORGIVENESS APPLICATION PROVIDES GREAT NEWS FOR BORROWERS AND MANY QUESTION;: WHAT WE KNOW NOW AND HOW TO PREPARE FOR THIS from 3 PM to 4:30 PM ET**

5/7/2020-Leimberg Webinar Services (LISI)-**Alan Gassman and Brandon Ketron present: What is Necessary, What is New? A Discussion of the SBA FAQ #31 and Other Hot Topics for PPP Loans, Including Repayment and Forgiveness Rules from 3 PM to 4:30 PM ET**

4/23/2020-Leimberg Webinar Services (LISI)-**Alan Gassman and Brandon Ketron present: Medical Practice and Physician Covid-19 Loans Laws, Strategies and Traps for the Unwary: What You Need to Advise Your Clients NOW! From 3 PM to 4:30 PM EDT**

4/24/2020-Leimberg Webinar Services (LISI)-**Alan Gassman and Martin Shenkman present: Asset Protection for Physicians and their Practices: The Doctor is In---But Where is the Tax and Estate Planning? From 1 PM to 2:30 PM ET**

4/24/2020-Leimberg Webinar Services (LISI)-**Alan Gassman and Mike Markham present: Cash Flow Crisis? What To Tell Your Clients Right Now from 3 PM to 4:30 PM EDT**

4/17/2020-Leimberg Webinar Services (LISI)-**Alan Gassman, Brandon Ketron and John Beck present: CARES Act and Related Planning for Landlords, Developers and Real Estate Investors- What You Must Know Now, and Also Later! From 3 PM to 4:30 PM EDT**

4/16/2020-Leimberg Webinar Services (LISI)-**Alan Gassman and Brandon Ketron present: Covid-19 Loan Rules for Churches and Other Religious Organizations Under Recent SBA Regulations and Pronouncements: What Advisors and Board Members Need To Know Now from 3 PM to 4:30 PM EDT**

4/3/2020-Leimberg Webinar Services (LISI)-**Alan Gassman, Brandon Ketron and John Beck present: The CARES ACT and More: What To Know and What to Do for Individuals, Businesses and Others from 1 PM to 2:30 PM ET**

4/2/2020-Leimberg Webinar Services (LISI)-**Alan Gassman, Colleen Flynn and Ian MacLean present Alert and Update on Paid Leave Benefits for the Coronavirus :What Advisors and Business Owners Need to Know After the March 24th Department of Labor Clarification and What Medical Insurance Carriers are Doing from 1 PM to 2:30 PM ET**

4/1/2020-Leimberg Webinar Services (LISI)-**Alan Gassman presents Creditor Protection and Bankruptcy Laws for Insolvent Businesses and Professional Practices: What Planners Need to Know Right Now! Strategies, Laws to Know and Traps for the Unwary from 1:00 PM to 2:30 PM ET**

3/24/2020-Leimberg Webinar Services (LISI)-**Alan Gassman and Lester Perling present Medical Practice Challenges and Planning In View of the Corona Virus from 1 PM to 2:20 PM ET**

3/25/2020-Leimberg Webinar Services (LISI)-**Alan Gassman and Brandon**

Ketron present Income, Estate, Employment and Medicare Tax Planning in Light of the Corona Virus Crisis from 11 AM to 12 PM ET

3/26/2020-Leimberg Webinar Services (LISI)-**Alan Gassman and Brandon Ketron present: Income Tax and Other Planning Tools to Consider in Light of Recent Events from 1 PM to 2:30 PM ET**

3/20/2020-Leimberg Webinar Services (LISI)-**Alan Gassman and Colleen Flynn present: Paid Leave Benefits for the Corona-Virus: What Advisors and Business Owners Need to Know from 1 PM to 1:30 PM ET**

2/27/2020-Leimberg Webinar Services (LISI)-**Alan Gassman and Christopher Denicolo present: Critical Planning after the SECURE Act - Using Disclaimers, Toggling and Other Mechanisms to Provide Flexibility and Keeping Your Options Open from 3 PM to 4:30 PM ET**

2/13/2020-Leimberg Webinar Services (LISI)-**Alan Gassman, Jonathan Blattmachr and Sean Healy present: NFA Gun Trusts: Keeping Safe At The Range And In The Estate Plan from 3 PM to 4:30 PM ET**

2/14/2020-Leimberg Webinar Services (LISI)-**Alan Gassman and Ken Crotty present: Estate Tax Planning with Family Entities After Powell and Strangi: New Lessons from Heckerling 2020 from 3 PM to 4:30 PM ET**

2/6/2020-Leimberg Webinar Services (LISI)-**Alan Gassman, Christopher Denicolo, Brandon Ketron & John Beck present: IRAs and Pension Accounts After the SECURE Act with Charitable and Creditor Protection Planning from 3 PM To 4 PM**

1/24/2020-Leimberg Webinar Services (LISI)-**Alan Gassman, Christopher Denicolo and Brandon Ketron present: Creative And Innovative Planning In The Wake Of The SECURE Act from 1 PM to 2:30 PM ET**

1/30/2020-Leimberg Webinar Services (LISI)-**Alan Gassman, Christopher Denicolo, Brandon Ketron & John Beck present: Charitable and Creditor Protection Planning with IRA's and Pension Accounts after the SECURE ACT from 3 PM To 4 PM**

1/9/2020-Leimberg Webinar Services (LISI)-**Alan Gassman, Christopher Denicolo and Brandon Ketron present: Practical Estate and Trust Planning After the SECURE Act from 1 PM to 2:30 PM ET**

1/3/2020-Leimberg Webinar Services (LISI)-**Alan Gassman and John Beck present: Economic Opportunity Zones: Certainty and Further Questions Resulting from Final Regulations from 1 PM to 2:30 PM ET**

11/21/2019-Leimberg Webinar Services (LISI)-**Alan Gassman, Ken Crotty and Christopher Denicolo present: Dynamic Planning with Irrevocable Trusts After TRA 2017 from 3 PM to 4:30 PM ET**

11/22/2019-Leimberg Webinar Services (LISI)-**Alan Gassman presents: Planning With APT's After Rensin and Cleopatra, and Other Planning**

Opportunities and Developments--Let My Assets Go! From 3 PM to 4:30 PM ET

11/20/2019-Leimberg Webinar Services (LISI)-**Alan Gassman and Christopher Denicolo present: Estate and Trust Planning with S Corporations After TRA 2017 - And Recent Developments from 3 PM to 4:30 PM ET**

11/21/2019-Leimberg Webinar Services (LISI)-**Alan Gassman and John Beck present: Economic Opportunity Zones: Strategies For Your Clients from 1 PM to 2:30 PM ET**

11/1/2019-Leimberg Webinar Services (LISI)-**Alan Gassman, Brandon Ketron and John Beck present: Dynamic Charitable Planning for Estate and Tax Professionals after TRA 2017 - With Recent Developments from 3 PM to 4:30 PM ET**

11/8/2019-Leimberg Webinar Services (LISI)-**Alan Gassman and Brandon Ketron present: Creative Trust Planning to Save Taxes Under Section 199A And Otherwise from 3 PM to 4:30 PM ET**

11/13/2019-Leimberg Webinar Services (LISI)-**Alan Gassman, John Beck and Leslie Share present: Non-Charitable Private Foundations: A Hybrid Entity That Can Provide Effective Asset Protection, Flexibility and Cost Savings from 3 PM to 4 PM ET**

10/31/2019-Leimberg Webinar Services (LISI)-**Alan Gassman and William Prescott present: Why Dentists are Different from 1 PM to 2:30 PM ET**

10/3/2019-Leimberg Webinar Services (LISI)-**Alan Gassman and Ken Crotty present: Estate Tax Planning with Family Entities After Powell and Strangi from 3 PM to 4:30 PM ET**

9/13/2019-Leimberg Webinar Services (LISI)-**Alan Gassman and Srikumar Rao present: Successfully Handling Ethical and Professional Challenges for Estate Planners and Tax Professionals: Lead the Field With Passion, Enjoyment and Meaning for Yourself, Your Team and Your Clients from 1 PM to 2:30 PM ET**

8/30/2019-Leimberg Webinar Services (LISI)-**Alan Gassman, Brandon Ketron and John Beck present: Understanding the Section 469 Passive Loss Rules: Traps For The Unwary & Important Related Planning Concepts Advisors Must Know About from 3 PM to 4:30 PM ET**

8/23/2019-Leimberg Webinar Services (LISI)-**Alan Gassman and Christopher Denicolo present: Why Our Trusts are Different than All Other Trusts from 3 PM to 4:30 PM ET**

8/22/2019-Leimberg Webinar Services (LISI)-**Alan Gassman, Brandon Ketron and John Beck present: Planning for Medicare and Employment Taxes -**

Paying Both, One, or Neither: Little Known Planning Techniques and Traps for the Unwary from 3 PM to 4:30 PM ET

Trust & Estate Planning with IRA and Pension Benefits – And Related Topics!, Alan Gassman with Christopher Denicolo, Esq., Kenneth Crotty, Esq. and Brandon Ketron, Esq., Leimberg Information Services (LISI), May 2018.

Self-Settled Trusts After Wacker, presented with Jonathan Blattmachr, Esq., and Martin Shenkman, Esq., Leimberg Information Services (LISI), April 2018.

What Advisors Need to Know to Help Florida-Based Clients Maximize Their Planning Opportunities!, Alan Gassman with Christopher Denicolo, Esq., Leimberg Information Services (LISI), March 2018.

Old Trusts, New Tricks. New Trust, Estate and Tax Planning Strategies After Tax Reform, Alan Gassman with Martin Shenkman, Esq. and Brandon Ketron, Esq., Leimberg Information Services (LISI), March 2018.

Creative Planning with Flow Through Entities Including 199A New Ideas, Alan Gassman with Christopher Denicolo, Esq., Kenneth Crotty, Esq., and Brandon Ketron, Esq., Leimberg Information Services (LISI), February 2018.

Planning with An $11,200,000 Per Person Estate Tax Exemption: Sophisticated Planning Techniques for the Super Wealthy, Clients With Significant Wealth and Those Who Are On Their Way!, Alan Gassman with Kenneth Crotty, Esq., Christopher Denicolo, Esq., and Brandon Ketron, Esq., Leimberg Information Services (LISI), January 5, 2018.

6/2018 Leimberg Information Services (LISI) **Asset Protection for Businesses and Their Owners**

6/2018 Leimberg Information Services (LISI) **Asset Protection Opportunities You May Not Know About**

Business Law Webinars – Sponsored/Moderated by Alan S. Gassman

Negotiating Leases and Related Relationships, April 2017

Designing and Enforcing Non-Competition Covenants in Florida, May 2017

Coordinating Business Conduct, Contractor Relationships and Insurances, June 2018

Creditor Protection Planning for the Professional Practice or Operating Business, July 2017

The Art and Science of Negotiating Agreements, August 2017

Negotiating the Purchase and Sale of a Business, September 2017

Choice of Entity and Multiple Entity Structures, October 2017

Uses and Abuses of Independent Contractor Arrangements, November 2017

Income Tax Strategies and Compliance Aspects of Business Planning, December 2017

Bloomberg BNA Webinars (2017) - Hosted by Alan S. Gassman

- **So Much to Choose From and So Little Time: A Comparison of the Best Freeze Planning Techniques**, January 18, 2017 by Stacy Eastland.
- **After Heckerling – What We Have Learned,** January 26, 2017 by Marty Shenkman
- **GST Taxation: An Overview**, February 8, 2017 by Jonathan G. Blattmachr.
- **Innovative Irrevocable Trust Planning in Uncertain Times**, February 24, 2017 by Edwin P. Morrow, Kenneth J. Crotty, Christopher J. Denicolo, and Brandon L. Ketron.
- **The New Estate Planning Lexicon: SUGRITS, SUGRATS, SUGRUTS, and Other Grantor-Retained Step-Up Trusts**, March 8, 2017 by Austin Bramwell.
- **Do This, Don't Do That: Things You Probably Don't Need Me For**, March 15, 2017 by Robert A. Mason.
- **Planning With LLCs And Limited Partnerships – Interesting Uses**, May 3, 2017 by Steven B. Gorin and Kenneth J. Crotty.
- **The Intersection of Business Transactions and Estate Planning**, May 10, 2017 by David Herzig.
- **Elder Law Strategy: Understanding the Maze of Asset Protection and Elder Law**, June 7, 2017 by Letha McDowell.
- **IRA Planning Opportunities And Pitfalls**, July 12, 2017 by Edwin P. Morrow and Christopher J. Denicolo.
- **Business Succession Planning Techniques: Passing the Business on Fairly to Family and.or Employees Using Income Tax and Investment Smart Methods**, July 28, 2017 by Jerome Hesch and Joy Spence.
- **Sophisticated Asset Protection Trust, Offshore LLC, and Related Planning**, August 9, 2017 by Jonathan E. Gopman.
- **The Most Common Challenges We See From the IRS and How to Avoid Them**, August 9, 2017 by John Porter.
- **Non-Tax Considerations of Estate Planning**, November 1, 2017 by Martin Shenkman.
- **Tax Planning for Marriage and Divorce**, November 8, 2017 by Carlyn McCaffrey, Nicole Pearl, and Jerome Hesch.
- **A Comprehensive Checklist For Succession Planning**, December 6, 2017 by

Turney Berry and Charles Redd.

- **Planning To Reduce Medicare And Self-Employment Taxes In Business, Investment, And Trust Structuring – 6 Structures That Can Be Used.**, December 13, 2017 by David Kirk.

Bloomberg BNA Webinars (Essential Elements 2016) - Hosted by Alan S. Gassman

- **Introduction to Income Taxation of Estates, Trusts, and Their Beneficiaries**, January 21, 2016 by Jonathan G. Blattmachr
- **Charitable Planning Techniques That Allow Uncle Sam to Contribute to Your Family & Charities**, February 18, 2016 by Turney Berry.
- **The Essentials of Planning Before and After Death**, March 17, 2016 by Martin M. Shenkman.
- **Mathematics for Estate Planners: Essential & Dynamic Planning Techniques that can be Understood by Clients and Must be Implemented by Advisors**, April 19, 2016 by Jerry Hesch, Kenneth Crotty, and Christopher Denicolo.
- **The Foundation and An Update on Defective Grantor Trusts, Installment Sales, Self-Cancelling Notes, and Private Annuities**, May 19, 2016 by Michael Mulligan and Jerry Hesch.
- **Basic and Intermediary Considerations for Trusts Established in Asset Protection Jurisdictions: Tax, Practical, and Other Considerations**, June 15, 2016 by Gideon Rothschild.
- **Basic but Effective Estate Planning Techniques and How the IRS May Look at Them**, July 14, 2016 by John W. Porter.
- **Estate & Trust Planning for IRA & Pension Account Assets**, August 11, 2016 by Edwin P. Morrow and Christopher Denicolo.
- **What Every Estate Planner Needs to Know about Partnership Tax**, September 15, 2016 by Ryan Prillaman and Jerry Hesch.
- **Year-End Tax Planning Checklist and Developments**, October 13, 2016 by Kenneth Crotty and Christopher Denicolo.
- **2016 Developments You Need to Know About**, November 10, 2016 by Sanford J. Schlesinger.
- **Planning Now for Probable and Possible Trump Tax Law Changes**, December, 2016 by Edwin P. Morrow, III, Christopher J. Denicolo, Kenneth J. Crotty, and Alan S. Gassman.

Bloomberg BNA Webinars (Practical and Creative Planning 2016) - Hosted by Alan S. Gassman

- **Hesch & Gassman on Life Insurance Planning**, February 25, 2016 by Jerry Hesch, Alan Gassman, and Seaver Brown.
- **An Advanced Guide to Issues & Planning Techniques for Defector Grantor Trusts, Installment Sales, Self-Cancelling Notes, and Annuities**, March 23,

2016 by Michael Mulligan and Jerry Hesch.

- **Pulling the Rabbit Out of the GRAT Hat: Some of the Most Creative Structural GRAT Planning Ideas We See Out There**, April 21, 2016 by Stacy Eastland.
- **Fundamentals, Fine Points, and Innovative Strategies for Life Insurance and Use Thereof**, May 10, 2016 by Jonathan Blattmachr.
- **Estate Planning: Financial Planning and Other Considerations that May Change How We Practice**, June 20, 2016 by Martin Shenkman.
- **Advanced Techniques for Mathematics for Estate Planning: Essential & Dynamic Planning Techniques That Can Be Undersood By Clients And Must Be Implemented By Advisors**, July 19, 2016 by Jerry Hesch, Kenneth Crotty, and Christopher Denicolo.
- **Income Tax Basis Planning: Using Your Estate Planning Family Limited Partnership for Income Tax Planning, Both at Death and While One is Still Living**, August 16, 2016 by Jerry Hesch.
- **Proposed Regulations under 2704: How These Would Work & What May Be Done Now For Clients And Structures**, August 25, 2016 by S. Stacy Eastland and John Porter.
- **Hot Topics in Estates, Gifts, and Trusts**, September 20, 2016 by Turney Berry, Amy Heller, and Jerry Hesch.
- **Evaluating Several Estate Tax Planning Structures & How the IRS May Look at Them**, October 18, 2016 by John W. Porter.
- **Three Advanced Asset Protection Trust Structures That Advisors Will Want to Understand and May Want to Recommend**, November 15, 2016 by Denis Kleinfeld and Alan Gassman.

Bloomberg BNA Webinars (2015 And Prior) - Presented/Moderated by Alan S. Gassman

- **Individual and Group Medical Practices: Tax, Health Law, and Creditor Protection Planning**, March 2, 2015 by Alan S. Gassman, Lester Perling, and James Feutz.
- **Why Florida is Different - Important Things that Estate Planning Professionals Need to Know**, April 16, 2015 by Alan Gassman, Jerry Hesch, Kenneth Crotty, and Christopher Denicolo.
- **The Tax Advisors Guide to Life Insurance: Structuring Tools and Techniques**, May 12, 2015 by Jerry Hesch, Barry Flagg, and Alan Gassman.
- **Creative Tax Planning for Real Estate Transactions and Investors: A Practical Guide for Real Estate and Tax Advisors and Their Clients**, June 23, 2015 by Stephen Breitstone, Jerry Hesch, Christopher Denicolo, and Alan Gassman.
- **Have Gun Trust Will Travel: How to Design, Draft, and Implement Gun Trusts**, August 5, 2015 by Sean P. Healy, Lee-ford Tritt, Alan S. Gassman, and Seaver Brown.
- **Estate and Trust Planning with IRA and Qualified Plan Benefits: An**

Understandable System with Charts and Easy to Understand Materials, August 6, 2015 by Alan S. Gassman, Edwin P. Morrow, III, and Christopher Denicolo.

- **Powerful Planning Considerations for Fortifying & Defending Domestic Asset Protection Trusts**, September 9, 2015 by Al W. King, III (moderated by Alan Gassman).
- **Whether to Marry? And What to Consider**, September 30, 2015 by Lee-ford Tritt, Christopher Denicolo, Alan Gassman, Dena Daniels, Seaver Brown, Alyssa Perez, and Travis Arango.
- **Planning for Snowbirds: Tips, Traps and Tactics for Advisors with Clients in Florida**, Bloomberg BNA Tax & Accounting, May 28, 2013.
- **Don't Discount the Use of Discounts,** Bloomberg BNA Tax & Accounting, March 7, 2013.
- **Top 10 Things to Do In 2013,** Bloomberg BNA Tax & Accounting, February 20, 2013.
- **Year End Planning: DOs and DON'Ts,** Bloomberg BNA Tax & Accounting, October 30, 2012.
- **Interesting Interest; Minimum and Maximum Interest Rates for Intra-Family Transactions and Applications of the OID Rules to Intra-Family Debt Obligations with Professor Jerry Hesch**, Bloomberg BNA Tax & Accounting, October 18, 2012.
- **Dynasty Trusts in Your Home State: Design, Draft and Implement Trusts to Receive Large Gifts in 2011 and 2012**, Bloomberg BNA Tax & Accounting, June 20, 2012.
- **2012 Estate Tax Strategies**, Bloomberg BNA Tax & Accounting, May, 22, 2012.
- **Individual and Group Medical Practices: Tax, Health Law and Creditor Protection**, Bloomberg BNA Tax & Accounting, April 25, 2012.
- **Hiring and Terminating Employees: What to Do, What to Avoid**, Bloomberg BNA Tax & Accounting, April 4, 2012.
- **With Stacy Eastland: "Two of My Favorite 2012 Planning Ideas",** Bloomberg BNA Tax & Accounting, March 27, 2012.
- **Avoiding Medical Practice Disaster: Pain Medication, Prescription and Other Commonly Misunderstood Laws**, Bloomberg BNA Tax & Accounting, March 20, 2012.
- **Making Best Use of the $5.12 Million Exemption, with Louis A. Mezzullo and John Porter**, Bloomberg BNA Tax & Accounting, February 22, 2012.
- **How to Design, Explain and Implement Dynasty Trusts and Asset Protection Trusts and Maximize Benefits Under Current Federal and State Law**, Bloomberg BNA Tax & Accounting, July 26, 2011.
- **US and UK Estate Planning for International Families: An Update on US and UK Law, Developments and Strategies**, Bloomberg BNA Tax & Accounting, May 26, 2011, Presented in London, England.
- **Dynasty Trusts in Your Home State: Design, Draft and Implement Irrevocable Trusts to Receive Large Gifts in 2011 and 2012**, Bloomberg BNA Tax & Accounting, October 25, 2011 presented by Alan Gassman and Steven J.

Oshins.

- **Avoiding Disaster in the Sunshine State: Responding to the New Durable Power of Attorney Rules**, Bloomberg BNA Tax & Accounting, October 19, 2011.
- **2011 - 2012 Estate Tax Strategies**, Bloomberg BNA Tax & Accounting, July 12, 2011.
- **2011 Estate Tax Strategies**, Bloomberg BNA Tax & Accounting, March 31, 2011.
- **Estate Tax Law Changes in 2011**, Bloomberg BNA Tax & Accounting, December 29, 2010, January 19, 2011, and February 10, 2011.
- **Individual and Group Medical Practices: Tax, Health Law, and Creditor Protection Planning**, BNA Tax & Accounting, March 2010.

PRESENTATIONS/WEBINARS SPONSORED BY ALAN S. GASSMAN'S LAW FIRM: GASSMAN, CROTTY & DENICOLO, P.A.

11/6/2021-Creditor Protection From A to Z
11/4/2021-Estate Planning Council of Birmingham - Innovative Charitable Planning Techniques
10/30/2021-The Bare Essentials of Last Minute Estate Tax Planning
10/16/2021-Innovative Charitable Planning Techniques
10/9/2021-And To Think I Saw It On Tax Berry Street
10/2/2021-Case Studies In Estate Tax Planning - Learning By Example
9/25/2021-Estate Tax Planning Update - The State of The Nation (Alan Gassman & Jerry Hesch)
9/18/2021-WHAT TO DO IN VIEW OF THE SEPT. 13TH ESTATE TAX PROPOSALS - THE TIME TO DECIDE IS NOW
9/11/2021-Greatest Hits A Review Part 2
9/4/2021-Estate Tax Planning, Community Property Trusts and Other Topics
8/28/2021-Family Installment Planning From A to Z (Alan Gassman & Kenneth Crotty)
8/21/2021-Spousal Limited Access Trusts From A to Z Slattery Will Get You Everywhere (Alan Gassman & Christopher Denicolo)
8/20/2021-Structuring Medical Practices Under Stark And After Recent CMS Opinion (Alan Gassman and Lester Perling)
8/14/2021 - Greatest Hits of Estate Tax Planning And More (Gassman)
8/7/2021-PPP and Employee Retention Credit (ERC) Update (Gassman & Ketron)
8/07/2021-The SCGRAT, the JEST, and the E Street Shuffle (Gassman & Ketron)
7/24/2021-Alan Gassman and Brandon Ketron present: Estate Planning for Business Owners
7/17/2021-Alan Gassman presents: Hard Questions and Interesting Answers for Estate Planners
7/10/2021-Alan Gassman presents: More Mathematics of Estate Tax Planning
7/10/2021-Alan Gassman, Kenneth DeGraw, Christopher and Elizabeth present:

Planning for the Insolvent Business Entity
7/03/2021-Alan Gassman presents: Special Update on Recent Developments and Hot Topics
6/30/2021-Alan Gassman and Brandon Ketron present: June 30 Deadline for HSS
6/26/2021-Alan Gassman presents: Asset Protection Meets Estate Tax Planning
6/19/2021-Alan Gassman presents: Trust Structures and Strategies
6/12/2021-Alan Gassman presents: Let's Talk About Trusts
6/5/2021-Alan Gassman presents: Part 2 Nuts and Bolts on Federal Estate Tax
5/29/2021-Alan Gassman presents: Nuts and Bolts of Federal Estate Tax
5/22/2021-Alan Gassman presents: What the Biden Tax Plan Means for Estate Tax Planning and More Estate Tax Planning Strategies
5/15/2021-Alan Gassman presents: Mathematics of Estate Tax Planning Part 2 and You
5/8/2021-Alan Gassman presents: Double Feature - Still More Q and A & Mathematics of Estate Tax Planning 2021
5/1/2021-Alan Gassman presents: Spouse Limited Assets Trusts - How to Keep your SLAT from going Kersplat
4/24/2021-Alan Gassman presents: Enough Already With The Estate Tax Planning Q and A!
4/17/2021-Even More Questions and Answers on Estate Tax Planning for 2021
4/10/2021-Alan Gassman presents: Questions and Answers on Estate Tax Planning from 11:00 AM to 11:30 AM EDT (30 minutes)
3/20/2021-Alan Gassman, Brandon Ketron and Kevin Cameron present: ERC, PPP, Restaurant and Venue Update from 11 to 11:30 AM EDT
3/6/2021-Alan Gassman, Brandon Ketron and Kevin Cameron present: March 1st IRS Notice Provides Essential Guidance And Safe Harbors For The Employee Retention Credit from 9 to 9:30 AM EST
2/7/2021-Alan Gassman, Hiram Hazely and Chuck Daellenbach present: Form and Support Your Community Band
1/30/2021-Alan Gassman and Barry Portugal discuss the SCORE Mentor program with PPP Q&A from 9:30 to 10 AM EST
12/31/2020-Alan Gassman and Brandon Ketron present: New Stimulus Bill Explained from 9:30 to 10:05 AM EST
12/4/2020-Alan Gassman, Ken DeGraw and Michael Markham present: Subchapter V - And Recent Bankruptcy Law Developments from 12:30 to 1:15 PM EST
11/25/2020-Alan Gassman presents: Florida and Federal Creditor Exemption Update: 2020 Developments that can Impact Client Planning from 12:30 to 1 PM EST
11/25/2020-Alan Gassman and Brandon Ketron present: Tax Treatment of Expenses Paid with PPP Loan Funds from 2 to 2:30 PM EST
11/18/2020-Alan Gassman, Ken DeGraw and Andrew Barg present: Advanced Tax Planning And Strategies For Insolvent Taxpayers - Including State Law Impact And State Taxes from 12:30 to 1:15 PM EST
11/4/2020-Alan Gassman, Ken DeGraw and Andrew Barg present: Taxation of Individuals and Businesses in Bankruptcy from 12:30 to 1:15 PM EST

10/26/2020-Alan Gassman and Sean Healy present: LETHAL PITFALLS IN DRAFTING GUN TRUSTS 12:30 to 1:20 PM

10/7/2020-Alan Gassman, Brandon Ketron and Kevin Cameron present: New PPP Notice Gives Borrowers Transfer Guidelines And Procedures from 11 to 11:30 AM EDT

8/28/2020-Alan Gassman, Brandon Ketron and Kevin Cameron present: SBA Changes PPP Loan Rules On August 24 - Hurting Some, Helping Others At Random from 12:30 to 1 PM EDT

8/8/2020-Alan Gassman, Brandon Ketron and Kevin Cameron present: PPP Rules after August 4th FAQs from 11 to 11:30 AM EDT

8/8/2020-Alan Gassman and Ken Crotty present: Cornflakes And Estate Tax Planning Mistakes from 12 to 12:30 PM EDT

8/7/2020-Alan Gassman presents: Estate Tax Basics from 1 to 1:30 PM EDT

8/6/2020-Prof. Jerry Hesch and Alan Gassman present: EstateView Software Overview And Why You Should Attend The Notre Dame Institute from 12 to 12:30 PM EDT

8/1/2020-Alan Gassman, Brandon Ketron and Kevin Cameron present: New PPP Loan Rules from 10 to 10:30 AM EDT

7/20/2020-Lester Perling presents: The Perling Review of New Florida Healthcare Laws and Their Implications Fair, Balanced, and Informative With Frequent Interruptions by Alan Gassman at 12:30 PM ET

7/8/2020- Alan Gassman, Brandon Ketron and Kevin Cameron PPP Forgiveness Basics For Owners and Employees of Small Businesses: Where Are We Now.

6/16/2020-Alan Gassman, Brandon Ketron and Kevin Cameron present: PPP Loan Rule Changes Since June 5th - More Than You May Think from 9 AM to 9:30 AM ET (replays at noon and 3)

6/4/2020-Alan Gassman and Brandon Ketron present: Senate Passes House Bill from 11:30 AM to 12 PM ET

6/3/2020-Alan Gassman and Colleen Flynn present: REHIRING RISKS AND PRACTICES: IMPORTANT ISSUES FOR FLORIDA EMPLOYERS AND PPP ISSUES WILL PLAINTIFF LAWYER CLAIMS BE WORSE THAN THE VIRUS? PROTECTING YOUR PRACTICE OR BUSINESS IN THE REHIRE AND ADMINISTRATION OF LEAVE PROCESS

5/30/2020-Alan and Brandon: The PPP Prescription - H.R. 7010 Is The Right Medicine, But Not For All

5/28/2020-Alan Gassman presents: What Clients Need To Know About Bankruptcy from 12:30 PM to 1 PM ET

5/24/2020-Alan Gassman, Brandon Ketron and Kevin Cameron present: PPP Loan Update - Friday, May 22nd SBA Regulation Discussion "They've Done It Again!" from 11 AM to 11:30 AM EDT

5/20/2020-Alan and Brandon present: Update for Medical Practices from 9 AM to 9:15 AM ET

5/19/2020-Alan, Brandon and Kevin Cameron present "PPP Rules After the Release of the Forgiveness Application and Instructions: A Concise Overview from 9 AM to 9:30 AM ET

5/16/2020-Alan Gassman presents: Cornflakes And Estate Planning Mistakes from 9 AM to 9:30 AM ET
5/14/2020-Alan Gassman and Brandon Ketron present: PPP Loans, Etc: What We Learned In The Last Week from 12 PM to 12:30 PM ET
5/12/2020-Alan Gassman and Kevin Cameron present: PPP Loan Expense Tracker & Forgiveness Calculator from 4 PM to 4:30 PM ET
5/13/2020-Alan Gassman and Brandon Ketron present: Medical Practices - What To Do And Know During The Covid-19 Crisis from 8:30 AM to 9 AM ET
5/12/2020-Alan Gassman and Brandon Ketron present: PPP Loans, Etc - What Is Still Hot And What Is Not from 9 AM to 9:30 AM ET
5/6/2020-Learning at Lunch Webinar Series-Alan Gassman and Brandon Ketron present: Medical Practices - How The Next $20 Billion Is Working And More from 9 AM to 9:30 AM ET
5/5/2020-Learning at Lunch Webinar Series-Alan Gassman and Brandon Ketron present: Virus Loans Update - What's Hot and What's Not from 9 AM to 9:30 AM ET
4/10/2020-Learning at Lunch Webinar Series-Alan Gassman presents What Our Clients Need to Know About Loans, Tax Laws, Coronavirus Related Laws and Planning -- For Clients And Their Advisors from 12:30 to 1:30 PM
4/8/2020-Learning at Lunch Webinar Series-Brandon Ketron and Alan Gassman present: Update on Payroll Protection Act Loan Rules What we learned from the April 6th Frequently Asked Questions (FAQ) Memo and Otherwise from 10 am to 10:30 AM
4/6/2020-Learning at Lunch Webinar Series-Alan Chris and John present: Saturday's Questions and Answers Clarify And Repair Governor's Stay at Home Order from 9 AM to 9:30 AM EDT
3/30/2020-Learning at Lunch Webinar Series-Alan Gassman, Brandon Ketron & John Beck present Charitable, IRA, Loan / Grant Planning And Coverage Of Payroll Taxes Under The CARE Act from 12:30 PM to 1 PM ET
3/31/2020-Learning at Lunch Webinar Series-Alan Gassman, Brandon Ketron & John Beck present NOL, Interest Deduction, Leveraged Real Estate & Other Planning Under The Care Act from 12:30 PM to 1 PM ET
4/1/2020-Learning at Lunch Webinar Series-Alan Gassman, Brandon Ketron & John Beck present What We Haven't Said About The CARE Act And More from 12:30 PM to 1 PM ET
2/20/2020-Learning at Lunch Webinar Series-Alan Gassman presents: Success Tips for First Year Lawyers (and all other professionals) - Part 3 from 12:30 PM to 1 PM ET
2/13/2020-Learning at Lunch Webinar Series-Alan Gassman presents: Planning for Florida Dental Practices and Their Owners - Part 2 from 12:30 PM to 1 PM ET
1/30/2020-Learning at Lunch Webinar Series-Alan Gassman presents: The Biggest Mistakes Physicians Make As Owners and Non-Owners in Medical Practices from 12:30 PM to 1 PM ET

1/23/2020-Learning at Lunch Webinar Series-Christopher Denicolo presents: Explaining the Installment Sale to a Defective Trust from 12:30 PM to 1 PM ET (Moderated by Alan Gassman)
1/16/2020-Learning at Lunch Webinar Series-David Howell, Larry Rybka and Tom Love present: How to Retire in the Magical Retirement Income Castle in the Clouds from 12:30 PM to 1 PM ET (Moderated by Alan Gassman)
12/26/2019-Learning at Lunch Webinar Series-Alan Gassman presents: Success Tips for First Year Lawyers (and all other professionals) - Part 2 from 12:30 PM to 1 PM ET
1/2/2020-Learning at Lunch Webinar Series-Alan Gassman, Christopher Denicolo and Brandon Ketron present: 30 Minutes To Understand The SECURE Act from 12:30 PM to 1 PM ET
1/9/2020-Learning at Lunch Webinar Series-David Finkel presents: The Ten Must-Follow Rules to Leverage Your Personal Assistant to Make Your Life More Fun, Profitable, and Enjoyable from 12:30 PM to 1 PM ET (Moderated by Alan Gassman)
12/12/2019-Learning at Lunch Webinar Series-Barry Flagg presents: Indexed Universal Life - Who Says Hedge Funds Are Only For the Rich? from 12:30 PM to 1 PM ET (Moderated by Alan Gassman)
12/18/2019-Pre-recording ONLY-David Howell and Larry Rybka present: How to Retire in the Magical Retirement Income Castle in the Clouds from 10 AM to 10:30 AM ET (Moderated by Alan Gassman)
12/19/2019-Learning at Lunch Webinar Series-Alan Gassman presents: Success Tips for First Year Lawyers (and all other professionals) - Part 1 from 12:30 PM to 1 PM ET
12/5/2019-Learning at Lunch Webinar Series-Barry Flagg presents: What To Ask For To be Able to Actually "Read" A Life Insurance Illustration? from 12:30 PM to 1 PM ET (Moderated by Alan Gassman)
11/21/2019-Learning at Lunch Webinar Series-Alan Gassman presents: Planning for Florida Dental Practices and Their Owners from 12:30 PM to 1 PM ET
10/31/2019-Learning at Lunch Webinar Series-Barry Flagg presents: Should Irrevocable Life Insurance Trusts (ILITs) be domiciled in NY? from 12:30 PM to 1 PM ET (Moderated by Alan Gassman)
10/8/2019-Learning at Lunch Webinar Series-Srikumar Rao presents: Dealing with Challenges Ethically - Part 2 (Moderated by Alan Gassman) from 12:30 PM to 1 PM ET
10/10/2019-Learning at Lunch Webinar Series-Jonathan Blattmachr presents: On the Front Line with JB; What America's Number One Estate Planner is Thinking from 12:30 PM to 1 PM ET (Moderated by Alan Gassman)
10/15/2019-Learning at Lunch Webinar Series-John Beck presents: Economic Opportunity Zones: Strategies to Qualify Before December 31, 2019 from 12:30 PM to 1 PM ET (Moderated by Alan Gassman)
10/17/2019-Learning at Lunch Webinar Series-David Finkel presents: Five Simple, Easy Ways to Increase Your Professional Practice's Profit by $50,000 or More from 12:30 PM to 1 PM ET (Moderated by Alan Gassman)

10/3/2019-Learning at Lunch Webinar Series-Barry Flagg presents: New York Best Interest Rule for Life Insurance - A Game Changer from 12:30 PM to 1 PM ET (Moderated by Alan Gassman)
9/19/2019-Learning at Lunch Webinar Series-Colleen Flynn presents: Hiring Employees-10 Practical and Legal Strategies from 12:30 PM to 1 PM ET (Moderated by Alan Gassman)
9/26/2019-Learning at Lunch Webinar Series-Colleen Flynn presents: Terminating Employees from 12:30 PM to 1 PM ET (Moderated by Alan Gassman)
9/3/2019-Learning at Lunch Webinar Series-David Finkel presents: The Freedom Formula: How to Succeed in Business Without Sacrificing Your Family, Health, or Life from 12:30 PM to 1 PM ET (Moderated by Alan Gassman)
9/12/2019-Learning at Lunch Webinar Series-Michael Lehmann presents: Form 1023 Line by Line from 12:30 PM to 1 PM ET (Moderated by Alan Gassman)
8/29/2019-Learning at Lunch Webinar Series-Larry Heinkel presents: Common CPA Mistakes that Cause IRS catastrophes - Part 2 from 12:30 PM to 1 PM ET (Moderated by Alan Gassman)
8/22/2019-Learning at Lunch Webinar Series-Steve Hogan presents: The Wayfair Case: What Now? from 12:30 PM to 1 PM ET (Moderated by Alan Gassman)
8/20/2019-Learning at Lunch Webinar Series-Srikumar Rao presents: Dealing with Challenges Ethically - Part 2 from 12:30 PM to 1:30 PM ET (Moderated by Alan Gassman)
8/15/2019-Learning at Lunch Webinar Series-David Blain presents: What I Wish Lawyers and CPAs Knew About Pension Plans Part 2 from 12:30 PM to 1 PM ET (Moderated by Alan Gassman)
8/8/2019-Learning at Lunch Webinar Series-Alan Gassman presents: Florida Creditor Protection for Medical Practices from 12:30 PM to 1 PM ET
7/25/2019-Learning at Lunch Webinar Series-David Blain presents: What I Wish Lawyers and CPAs Knew About Pension Plans Part 1 from 12:30PM to 1PM ET (Moderated by Alan Gassman)
7/30/2019-Learning at Lunch Webinar Series-Lester Perling presents: Health Law Legislative Update from 12:30PM to 1PM ET (Moderated by Alan Gassman)
8/1/2019-Learning at Lunch Webinar Series-Srikumar Rao presents: Dealing with Challenges Ethically from 12:30PM to 1PM ET (Moderated by Alan Gassman)
7/18/2019-Learning at Lunch Webinar Series-Brandon Ketron presents: Planning for the Medicare and Employment Taxes - Paying Both, One, or Neither. Little Known Planning Techniques and Traps for the Unwary from 12:30PM to 1PM ET (Moderated by Alan Gassman)
11/5/20213-Decanting Irrevocable Trusts Giving an Old Trust a Face Lift, Tuesday, November 5, 2013 | 12:30 PM GUEST PRESENTER: DIANE ZEYDEL

BAR SECTION MEMBERSHIPS

Florida Bar Real Estate, Probate and Trust Law Section.

Florida Bar Tax Section.

Florida Bar Business Law.

Florida Bar Elder Law.

Florida Bar Health Law.

American Bar Tax Law Division.

American Bar Foundation.

PROFESSIONAL SERVICE

Member of Board of Directors – Ruth Eckerd Hall.

Member of Executive Committee – Ruth Eckerd Hall.

Co-Chairman of the Professional Advisory Committee – Ruth Eckerd Hall.

Executive Council Member, The Florida Bar Tax Section, 2003 - Present.

Former President and Director, Pinellas County Estate Planning Council.

Founding Trustee and Manager of the Sara Gassman Music Foundation.

Member of the Advisory Board - InterActive Legal.

Member of the Clearwater Bar Association - Clearwater, FL.

National Association of Estate Planners & Councils (NAEPC) Diversity, Equity and Inclusion Committee.

J:\G\Gassman\BIOS & CV\Curriculum Vitae ofALAN S.1a.wpd