Webinar for Professional Advisors

"2017 Tax Reform- The Continued Importance of Life Insurance" with Robert Keebler

Date:

Wednesday, January 18, 2017

Time:

3:00-4:00 p.m. Eastern
2:00-3:00 p.m. Central
1:00-2:00 p.m. Mountain
Noon-1:00 p.m. Pacific

Presentation topics:

Various proposals have been put forth for 2017, all following a general theme of broad based tax cuts mixed with fewer deductions and overall simplification. Join us to learn more about:

1. Understanding the current income tax and estate tax proposals
2. Why estate tax might not go away permanently
3. Understanding carryover basis and/or taxation of capital gains at death
4. The continued importance of life insurance even if estate tax disappears.

Accountants:

If you have a site monitor at your viewing location and you pre-register to attend, you can earn CPE credit for attending this webinar. To pre-register, click the URL on the next page. Once you register, you will be emailed the appropriate forms to apply for credit. This course qualifies with NASBA for 1.0 hour of CPE credit in the category Taxes.

About the Presenter

Robert S. Keebler, CPA/PFS, MST, AEP (Distinguished) is a partner with Keebler & Associates, LLP and is a 2007 recipient of the prestigious Accredited Estate Planners (Distinguished) award from the National Association of Estate Planners & Councils. He has been named by CPA Magazine as one of the *Top 100 Most Influential Practitioners in the United States* and one of the *Top 40 Tax Advisors to Know During a Recession*. His practice includes family wealth transfer and preservation planning, charitable giving, retirement distribution planning, and estate administration. Mr. Keebler frequently represents clients before the National Office of the Internal Revenue Service (IRS) in the private letter ruling process and in estate, gift and income tax examinations and appeals, and he has received more than 250 favorable private letter rulings including several key rulings of "first impression." He is the author of over 100 articles and columns and is the editor, author or co-author of many books and treatises on wealth transfer and taxation. Mr. Keebler has been a speaker at national estate planning and tax seminars for over 20 years including the AICPA's: Estate Planning, High Income, Advanced Financial Planning Conferences, ABA Conferences, NAPEC Conferences, The Notre Dame Estate Planning Conference and the Heckerling Estate Planning Institute and is currently the chair of the 2017 AICPA ENGAGE Conference.

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Upcoming 2017 Advisor Webinar Series

Attorney Patricia Annino
Wednesday, April 19, 2017 | 3:00-4:00 pm Eastern

Professor Samuel A. Donaldson
Wednesday, July 19, 2017 | 3:00-4:00 pm Eastern

Professor Christopher Hoyt
Wednesday, November 15, 2017 | 3:00-4:00 pm Eastern

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