Webinar for Professional Advisors

Private Decanting:
Changing an Irrevocable
Trust Without Your Entire
Family Knowing



Steven J. Oshins, Esq., AEP® (Distinguished)



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

Date: Wednesday, January 29, 2020

Presentation topics:

This impactful webinar, delivered exclusively for professional advisors, will feature noted attorney Steve Oshins, who has successfully petitioned changes to state law in Nevada in relation to trusts. During this one-hour presentation, Oshins will discuss:

- 1. Decanting a trust and the common reasons for doing so.
- 2. How to decant a trust, and the different states' laws that apply.
- 3. What you can do if the current trust situs doesn't allow decanting.
- 4. Tax issues to consider when decanting trusts.

Accountants:

If you have a course 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. Prior to the webinar, 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.

Steven J. Oshins, Esq., AEP® (Distinguished), Partner, Oshins & Associates, LLC, Las Vegas, NV

Steve is a member of the Law Offices of Oshins & Associates, LLC in Las Vegas, Nevada. He was named the Las Vegas Trusts and Estates Lawyer of the Year by The Best Lawyers in America®. He was inducted into the NAEPC Estate Planning Hall of Fame® in 2011. He has been named one of the 24 "Elite Estate Planning Attorneys" in America by The Trust Advisor and one of the Top 100 Attorneys in Worth. He wrote the language underlying many of Nevada's most important estate planning and asset protection laws, including the law allowing a 365-year Dynasty Trust, the law making the charging order the exclusive remedy against Nevada business entities and not allowing equitable remedies, and the law making Nevada the only jurisdiction to allow restricted LLCs and LPs, thereby making Nevada the state allowing the largest valuation discounts.

Private Decanting: Changing an Irrevocable Trust Without Your Entire Family Knowing

with Steven J. Oshins, Esq., AEP® (Distinguished)

Attend the presentation:

https://newyorklife.acms.com/e31da997p1ve/event/registration.html

To ensure the best possible webinar experience, we recommend the following:

Test your connection: It is critical that you test your connection; click on the link below: https://newyorklife.acms.com/common/help/en/support/meeting_test.htm

Listen via your speakers: Use your computer speakers or headset to listen to the webinar. If needed, you can also listen with your phone by dialing 1-888-466-9845 and entering the passcode 8300128.

Technical support: If you experience issues registering or attending, call the Webinar Support Hotline at 1-800-866-0888 and select the following phone prompts: choose 'Existing Customer', then choose 'Technical Support', finally choose 'Web.'

Mobile access - Adobe Connect runs on tablets and smartphones. Users just need to download the application from the App Store of their choice.

For details, go to http://www.adobe.com/products/adobeconnect/apps/adobe-connectmobile.html



These presentations are for educational purposes only and are prepared for the general information and education of professional advisors who work with agents of New York Life Insurance Company. They are not intended for use with the general public. The presentations discuss current developments and set forth generally accepted concepts or principles. Program materials may include a discussion of tax-related topics prepared to assist in the promotion or marketing of the transactions or matters addressed. They are not intended (and cannot be used by any taxpayer) for the purpose of avoiding IRS penalties that may be imposed upon the taxpayer. No attempt is made to offer legal, accounting, tax, valuation, financial planning, investment, asset allocation or other professional advice, or to set forth solutions to individual problems. New York Life, its agents or employees may not give accounting, tax, or legal advice. For such advice and specific applications to individual cases, individuals must rely on the advice of their own professional advisors.

Steven J. Oshins is not affiliated with New York Life and is solely responsible for the content of this presentation, which may not necessarily represent the views of New York Life or its affiliates.

For CPE recipients: These one (1.0) hour advanced-level (group live) courses are offered for the benefit of practicing accountants with significant exposure to the subject and will focus on the development of in-depth knowledge necessary for proper consulting. These programs will provide the participant with an overview of technical topics related to estate planning. No advanced preparation is necessary.

New York Life Insurance Company is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit.

Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors on its website: www.NASBARegistry.org. For more information regarding registration, refund, complaint and program cancellation, please contact New York Life Insurance Company representative Heather Davis at 972-720-6704. SMRU 1840028 (exp. 1/29/2020)

© 2020 New York Life Insurance Company. All rights reserved.