

How the 2020 Election Affects the Top Planning Ideas

**Webinar for
Professional Advisors**



**Robert S. Keebler,
CPA/PFS, MST, AEP®
(Distinguished), CGMA**

Date: Wednesday, January 13, 2021

Time: 3:00 - 4:00 pm Eastern

(2 - 3 pm Central; 1 - 2 pm Mountain; Noon - 1 pm Pacific)

Presentation topics:

In this informative webinar, delivered exclusively for professional advisors, noted CPA Robert Keebler will explore the ramifications of the 2020 election results as they impact:

- Income tax planning for capital gains, retirement assets, charitable giving and SALT deductions;
- State income tax planning strategies using trusts;
- Estate and business succession ideas;
- Strategies to protect exemption while retaining cash flow; and
- ROTH conversion planning in 2021 and beyond.

Robert S. Keebler, CPA/PFS, MST, AEP® (Distinguished), is a partner with Keebler & Associates, LLP, and a 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 and Advanced Financial Planning conferences, ABA conferences, NAPEC conferences, The Notre Dame Estate Planning conference and the Heckerling Estate Planning Institute.

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, use the link on the following 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 field of study: Taxes.

How the 2020 Election Affects the Top Planning Ideas

With Robert S. Keebler, CPA/PFS, MST, AEP® (Distinguished), CGMA

To register for and attend this session, use the link below:

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Technical support: If you experience issues registering or attending, please visit <https://support.zoom.us>

Mobile access: Zoom runs on tablets and smartphones. Download the application from the App Store of your choice.



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educational-resources/](http://nyladvisors.com/educational-resources/)

Participants will: Be exposed to in-depth knowledge necessary for proper consulting on topics related to the potential changes in income tax planning for capital gains, retirement assets, charitable giving and SALT deductions, state income tax planning strategies using trusts, estate and business succession ideas, strategies to protect exemption while retaining cash flow and ROTH conversion, as a result of the 2020 election results.

Prerequisites: Practicing accountants and attorneys with significant exposure to the subject.

Who should attend: This presentation is prepared for the general information and education of professional advisors who work with agents of New York Life Insurance Company. It is for educational purposes only and not intended for use with the general public.

Advanced preparation: None.

Program level: Advanced.

Delivery method: Group live.

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