Webinar for Professional Advisors

What Advisors Need to Know for High Net Worth Planning in 2021 and Beyond

Patricia Annino, JD, LL.M.

Date: Wednesday, April 28, 2021

Time: 3:00 - 4:00 pm Eastern
(2 - 3 pm Central; 1 - 2 pm Mountain; Noon - 1 pm Pacific)

Presentation topics:

This webinar, delivered exclusively for professional advisors, will look at proposed changes to the tax law and the estate planning strategies high net worth clients should consider, with an indepth discussion of the following techniques:

- Sale to a grantor trust.
- GRATs and SLATs.
- Traditional gifting trusts such as life insurance trusts.
- Retirement planning under the SECURE Act and Roth conversions.
- The impact of IRC Section 6166 and state estate taxes.
- Changing client communications in a video world.

The presentation also will include case studies and practical tips that illustrate the increased importance of planning for high net worth clients.

Patricia Annino, JD, LL.M., is a partner in Rimon's Trust and Estates Group. A nationally recognized authority on estate planning and taxation, Ms. Annino has more than 30 years of experience serving the diverse needs of families, individuals, and owners of closely held businesses. Ms. Annino's practice includes all aspects of private client work, including estate planning; will and trust planning; incapacity planning; prenuptial and postnuptial agreements; estate litigation; advising executors, trustees and beneficiaries; and administration of estates and trusts. Ms. Annino particularly focuses on planning for family business owners, including coordinating their estate planning, corporate and succession needs. In addition, she represents non-profit entities and private family foundations. Ms. Annino testifies as an expert witness in high-stakes divorce cases where trusts and other inherited assets are at risk. Her testimony has been favorably reviewed by the Massachusetts Probate Courts. Ms. Annino is a frequent public speaker, and has presented nationally to high-level donors and trustees of hospitals, museums, and other nonprofits, as well as private banking clients, owners of closely held businesses, alumni organizations, and various New York Life educational events for advisors. She also writes a monthly column for CPA Insider, a newsletter sent to more than 160,000 CPAs and other wealth managers and advisors.

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.

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

https://nylife.zoom.us/webinar/register/WN_5JKqlQpySyGto2ZdjTULgw

To ensure the best possible webinar experience, test your connection here: https://nylife.zoom.us/test
It is critical that you test your connection prior to logging into the webinar.

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.

Participants will: Be exposed to in-depth knowledge necessary for proper consulting on topics related to the use of trusts in estate planning, gifting strategies designed to reduce tax, retirement planning considerations post SECURE Act, the use of IRC Sectrion 6166, state estate taxes, and how the changing family dynamics and digital communication tools have served to make planning more important than ever for HNW families.
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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