Webinar for Professional Advisors

Divorcing the Highly Planned Family: Addressing Irrevocable Trusts

Program overview:

High net-worth families who have created irrevocable trusts during marriage face unique issues upon divorce. In this webinar, delivered exclusively for professional advisors, Christine Wakeman will describe these issues and discuss possible solutions practitioners can offer their clients. During this one-hour presentation, Wakeman will cover:

- Types of SLAT / irrevocable trust issues present upon divorce;
- Methods to modify or terminate trusts;
- Status of grantor trusts;
- Regaining ownership of assets; and
- Specific tax issues associated with the possible solutions.

Date: Wednesday, September 22, 2021

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

Christine Wakeman, JD

Christine Wakeman, JD, is a member of Winstead's Wealth Preservation Practice Group. She is board certified in Estate Planning and Probate Law by the Texas Board of Legal Specialization. Christine has experience in a range of estate and business planning matters involving fiduciaries, trusts, taxation and high net worth individuals and their families. Prior to practicing law, Christine was selected as a Cortez A.M. Ewing Public Service Fellow and served in the Washington, D.C. office of United States Senator Dr. Tom Coburn during her fellowship. She has a Bachelor of Arts degree from the University of Oklahoma with a concentration in political science and a law degree from SMU Dedman School of Law.

Accountants can earn CPE credit by pre-registering using the link on the following page and responding to the polling questions that will be asked during the program.
This course qualifies with NASBA for 1.0 hour of CPE credit in the field of study: Taxes.

Divorcing the Highly Planned Family: Addressing Irrevocable Trusts

With Christine Wakeman, JD

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

https://nylife.zoom.us/webinar/register/WN_eCQUEZg2QJWV8KNDzwDzHw

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.

Learning objectives: Upon completion of this program, participants will be able to describe the types of problems irrevocable trusts present upon divorce; specifically identify the unique problems associated with SLATs upon divorce; understand the solutions available to solve problems created by irrevocable trusts upon divorce; and recognize the federal tax consequences associated with possible solutions to common problems upon divorce.
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.
Program level: Advanced.
Prerequisites: Practicing accountants and attorneys with significant exposure to the subject.
Advanced preparation: None required.
Delivery method: Group Internet based (GIB).
Recommended CPE credit and field of study: Participants will earn 1.0 CPE credits in the category "Taxes." In order to be awarded the full credits, participants must respond to the polling questions asked during the program, and complete and return the appropriate CE forms.
Registration requirements: To register for this program, go to https://nylife.zoom.us/webinar/register/WN_eCQUEZg2QJWV8KNDzwDzHw.
Program refund policy: There is no fee for attending this program.
Complaint resolution policy: For more information regarding administrative policies such as complaint, refund, and program cancellation, please contact the New York Life Insurance Company representative at 972-720-6704.
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 submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.
The presentation discusses current developments and sets forth generally accepted concepts or principles. New York Life, its agents or employees may not give accounting, tax, employment, or legal advice. For such advice and specific applications to individual cases, individuals must rely on the advice of their own professional advisors. Christine Wakeman and Winstead's Wealth Preservation Practice Group are not affiliated with New York Life and are solely responsible for the content of this presentation, which may not necessarily represent the views of New York Life or its affiliates.