



Planning for the Large Estate

Webinar for Professional Advisors

Program overview:

Estate tax planning in the current environment is as complicated as ever. Whether clients are under, significantly over, or uncertain of the impact the estate tax exemption will have, they all face complicated issues that require expert guidance from their advisors. In this one-hour webinar, Robert Keebler will show advisors how to balance the benefits of certain planning strategies against issues and considerations clients may be facing now or in the future, and provide participants with the knowledge to:

- Understand the mathematics of portability;
- Effectively use intentionally defective grantor trusts (IDGTs);
- Minimize income taxation of inter-vivos (living) trusts;
- Choose the state with the best trust and income tax benefits for the client; and
- Leverage the special advantage of using split-dollar life insurance.

Date: Wednesday, April 27, 2022

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)



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

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 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.

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

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

https://nylife.zoom.us/webinar/register/WN_alQk8cfjSfGmyW0fANceOw

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.



**Watch replays of the
Advisor Webinar Series:**

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

Learning objectives: Upon completion of this program, participants will be able to understand the mathematics of portability; effectively use intentionally defective grantor trusts (IDGTs); minimize income taxation of inter-vivos (living) trusts; choose the state with the best trust and income tax benefits for a client; and leverage the special advantage of using split-dollar life insurance.

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_alQk8cfjSfGmyW0fANceOw.

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.

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