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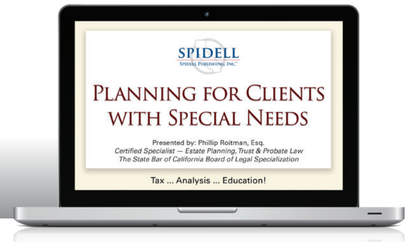
Planning for Clients with Special Needs



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Live Webinar
May 2019 — *date to be announced*
10:00 a.m. to Noon PT

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Designation	*CPE Hours*
CPA	2 Tax
EA/CRTP (CTEC)	2 Federal Tax
Attorney	1.5 General MCLE

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With this two-hour course, you will:

- Learn why, how, and when to use special needs trusts
- Identify and resolve related estate planning issues
- Understand why proper planning is crucial
- Explore the complex world of public benefits
- Walk through the administration and taxation of frst-party and third-party special needs trusts
- Learn about recent law changes affecting clients with special needs

Presented by:

Phillip Roitman, Esq.
Certified Specialist — Estate Planning, Trust & Probate Law
The State Bar of California Board of Legal Specialization

Phil Roitman emphasizes his practice in estate and wealth transfer planning, probate and trust administration, planning for clients with disabilities and special needs, business succession planning, and income tax planning. Phil works with families, business owners, executives, and other high net worth individuals to identify their financial and estate planning goals, and focuses on protecting the value of their assets.

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