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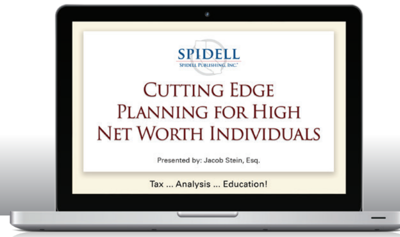
Cutting Edge Planning for High Net Worth Individuals



Live Webinar
Tuesday, June 4, 2019
8:30 a.m. to Noon PT

On-Demand Webinar
Available by June 11

$129

Designation	*CPE Hours*
CPA	4 Tax
EA/CRTP (CTEC)	4 Federal Tax
Attorney	3.25 General MCLE

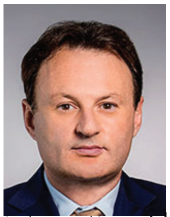
Webinar features:

- 4 hours of CPE for one attendee
- Unlimited number of people may watch and listen on one computer and print course outline
- PDFs of reference manual and PowerPoint slides
- Add CPE for only $30 per additional attendee*

The instructor will provide an overview of the various tools used in planning for high net worth individuals before delving into advanced structures and strategies that provide for optimal wealth preservation. He will draw on theory and strategies from several applicable areas such as taxation, estate planning, estate tax planning, asset protection, advanced trust planning, international planning and investing, and more. The instructor will share lots of real life anecdotes and will focus on the practical implications of the various rules and planning opportunities.

- Creative income tax planning structures
- Creative estate tax planning using IDGTs, parallel conversions, and private annuities
- Important estate planning considerations
- Asset protection for high net worth clients
- Domestic and offshore business entities
- Domestic and foreign trusts and the use of trust protectors
- Representing international families
- Offshore banking and investing

Presented by:



Jacob Stein, Esq., is the managing partner at Aliant, LLP. He specializes in structuring international business transactions, complex U.S. and international tax planning, and asset protection planning. Jacob received his law degree from the University of Southern California and a Master of Laws in Taxation from Georgetown University. He has been accredited by the State Bar of California as a Certified Tax Law Specialist. Jacob is AV-rated (the highest possible rating) by Martindale-Hubbell, and has been named "A Super Lawyer" by Los Angeles Magazine and one of "America's Most Honored Professionals 2016" by the American Registry.

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