

SPEAKING ENGAGEMENTS

Estate And Tax Issues For Individuals With Taxable Estates

DATE

June 22, 2017

SPEAKERS



**Douglas S.
Robson**
Partner

Wealthy individuals with taxable estates – net worth in excess of \$5.49 million per individual or \$10.98 million per married couple – face significant estate and tax issues. This program will focus on:

- The pitfalls of probate
- Benefits of a revocable trust
- The “portability” of the federal estate tax exemption
- Succession planning for closely held businesses
- The use of business principles to protect and transfer personal wealth
- Family Limited Partners/Family Limited Liability Companies
- The use of irrevocable trusts to:
 - “replace” the estate tax liability
 - “freeze” the value of your taxable estate
 - “protect” your principal from creditor

The speakers will discuss techniques that are applicable to both the closely held business owner and individuals with a portfolio of investments, including:

- Grantor Retained Annuity Trusts (GRATs)
- Intentionally Defective Irrevocable Trusts (IDITs)
- Qualified Personal Residence Trusts (QPRTs)
- Charitable Remainder Trusts (CRTs)



Speakers: Douglas Robson, Barnes & Thornburg and Marv Hills, Crowe

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Date: Thursday, June 22, 2017

Registration: 2:00 p.m. (Eastern)

Program: 2:30-4:00 p.m.

Reception: 4:00 - 6:00 p.m.

Questions? Please contact Orlanda Hauff at orlanda.hauff@btlaw.com or (260) 425-4676.