GAIN AN UNDERSTANDING OF THE NEW TAX LAWS & ESSENTIAL ESTATE PLANNING NEEDED IN TODAY'S TROUBLED ENVIRONMENT

Winton Smith, Attorney-at-Law, Presenter
Jack Hawkins, Jr. Hall, Room 122
July 22, 2020

Registration	……………………………………………….…………	8:30 a.m. – 9:00 a.m.
Welcome	……………………………………………..…………	9:00 a.m. – 9:10 a.m.
SESSION 1	The Basic Plan for Family, Friends and Charitable Interest … Wills, State Made Wills, The State Made Will, Planning for your Spouse, Planning for your Children, Planning for your Grandchildren, Planning for your Charitable Interests, DPOA, HCPOA, and Advanced Directive The Revocable Trust Will or Revocable Trust, How to Avoid Probate, No Loss of Control, Superior Plan for Disability, Private, Prompt, Tax Caveat, Planning for Spouse, Children & Grandchildren, and Planning for Charitable Interests	9:10 a.m. – 10:10 a.m.
Break	…………………………………..……………………	10:10 a.m. – 10:20 a.m.
SESSION 2	Qualified Retirement Plan ……..…………………. ……… Individual Retirement Plan, Roth IRA, 401k, 403(b), The Secure Act, Planning after The Secure Act, Regular IRA to Roth IRA, and Reinstating Lifetime Payments	10:20 a.m. – 11:30 a.m.
Lunch Provided	……………………………………..………………	11:30 a.m – 12:00 p.m.
SESSION 3	Advanced Tax Strategies ……..…………..……. ……… The Vanishing Estate Tax Exemption, Spousal Lifetime Access Trust, Grantor Retain Annuity Trust, Intentionally Defective Irrevocable Trust, Family Limited Partnerships, Limited Liability Companies, and Irrevocable Life Insurance Trust Charitable Lead Trust Tax-Smart Current Gifts, Tax-Smart Gifts that Provide Life Income, New Charitable Gift Annuity Rates, Tax-Smart Estate Gifts, Tax-Smart Retirement Plan Gifts, and Charitable Lead Trusts	12:00 p.m. – 2:00 p.m.