

SEMINAR

Estate, Gift & Generation-Skipping Transfer Tax: MCLE BasicsPlus!®

Understand the convoluted intersection between estate planning and tax law

Estate, Gift & Generation-Skipping Transfer Tax: MCLE BasicsPlus!® provides an in-depth look at estate and gift taxes, generation-skipping transfer taxes and the federal income tax. This intensive two-day program gives you the essential knowledge and understanding that you need to develop your core estate taxation skills and avoid common mistakes. You get direct, focused exposure to the experts in a dialogue that delves into the complex issues estate planners must navigate.

Agenda

Day One, Tuesday, October 29, 2019

- Imposition of Estate Tax and Credits
- Gross Estate
- Transfers That Remain in Gross Estate
- Ethical Issues
- Joint Interests; Proceeds of Life Insurance; Powers of Appointment
- Estate and Gift Tax Marital Deductions

Day Two, Wednesday, October 30, 2019

- Determination of Liability
- Special Valuation Rules and FLPs
- Taxable Estate Deductions
- Disclaimers and Certain Life Estates
- Generation-Skipping Transfers

Faculty

Joshua S. Miller, Esq., CFP®, TEP, *CIBC Private Wealth Management, Boston, Chair*

Sarah M. Allen, Esq., *Rice, Heard & Bigelow, Inc., Boston*

Kelly A. Aylward, Esq., *Lourie & Cutler, PC, Boston*

Luke C. Bean, Esq., *Rico, Murphy, Diamond LLP, Millis*

Kevin M. Ellis, Esq., *Hemenway & Barnes LLP, Boston*

Brian T. Liberis, Esq., *Gilmore, Rees & Carlson, PC, Wellesley Hills*

Amy R. Lonergan, Esq., *Day Pitney LLP, Boston*

Todd Povlich, CFA, ASA, *Management Planning, Inc., New York, NY*

Elliot Rotstein, CAP®, *Management Planning, Inc., Boston*

Amy Schnitzer, Esq., *Bessemer Trust, Boston*

Christopher A. Voukides, Esq., *Pierce Atwood LLP, Boston*

Amiel Z. Weinstock, Esq., *AZW Law LLC, Brookline*

Dates & Locations

BOSTON

Tuesday, October 29, &
Wednesday, October 30, 2019
9:30 am–4:30 pm

MCLE Conference Center,
10 Winter Place, via Winter Street
Program Number: 2200040P01

LIVE WEBCAST

Tuesday, October 29, &
Wednesday, October 30, 2019
9:30 am–4:30 pm

Register at www.mcle.org
Program Number: 2200040WBC

RECORDED WEBCAST

Tuesday, November 12, &
Wednesday, November 13, 2019
9:30 am–4:30 pm

Register at www.mcle.org
Program Number: 2200040RBC

Tuition (includes written materials)

- \$295
- \$265.50 MCLE Sponsor Members
- \$221.25 New Lawyers admitted to law practice after 2016, Pending Admittees, Law Students, and Paralegals

Materials

The materials for this program are available *online only* and can be viewed or downloaded via the link emailed to you.

Also, there is no need to take extensive notes. Two weeks after the live seminar, all registrants receive a link to a written verbatim transcript of this program.

Can't Attend?

View the webcast—live or later, or download the mp3 recording at www.mcle.org

Listen to the Audio CD

Available after Wednesday, November 13

- \$165
- \$148.50 MCLE Sponsor Members
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- ▶ **WALK UP** on the day of the program or **DROP IN** to
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Register early!

For course agendas, hours, fees, and discounts, please refer to the respective seminar pages. The fee includes all written materials unless otherwise noted, program instruction, and refreshment breaks. Lunch may be enjoyed on your own.

To reserve seating and gain access to online materials, please register in advance of the program.


Upon registration, MCLE will e-mail a confirmation. Please check in with the registrar on the day of the program.

Walk-in registrants are welcome, with the exception of limited enrollment programs. Please call us to confirm space availability and schedule.

We accept cash, checks, MasterCard, Visa, American Express, and Discover.

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Mandatory CLE credits

States have varying mandatory CLE credit requirements; individual attorneys are responsible for checking with their particular state CLE accreditation authority about whether and how much credit will be granted. Although MCLE does not pursue state-based credit, MCLE programs are regularly approved in many jurisdictions. It is the responsibility of the individual attorney interested in CLE credit to submit the information and certifications required under the respective state rule to the appropriate state authorities in the jurisdictions in which they seek credit.

Depending on the jurisdiction, lawyers can satisfy their mandatory CLE requirements online with MCLE's webcasts, which feature periodic attendance prompts, online written materials, and the opportunity to receive a certificate of attendance.

If your plans change

If you're unable to attend a program you've registered for, you will receive an email notification shortly after about how to access the program on demand via webcast and/or downloadable mp3 file, including the written materials in electronic form, in full satisfaction of the tuition paid. If you prefer a refund, let us know by the end of the business day prior to the program and we'll refund your tuition after deducting a \$25 processing fee. Note that limited enrollment programs are an exception, cancellation

of which require two weeks notice and are subject to a \$45 processing fee.

Attorney scholarships

Attorneys with financial need who certify that they are unable to attend a program without financial aid may request a partial tuition scholarship in confidence by writing or emailing scholarships@mcle.org **at least two weeks in advance of the program.**

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For the first three years of practice, MCLE offers new lawyers a 25% discount on all of its products, including programs (whether attending in person or via live or recorded webcast), books, audio CDs and mp3 recordings. If you were admitted to the bar after 2016, you can take advantage of the new lawyer prices listed throughout the catalog.

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 - 6-10 250
 - 11-25 500
 - 26-75 1,000
 - 76-150 \$ 2,500
 - 151-250 3,500
 - 251+ 4,500