

Advanced Issues in Asset Protection Planning

How to avoid kissing your assets good-bye

Why attend?

Are you ready with the latest information the next time your client wants to discuss protecting wealth from unforeseen creditors? This course explains how asset protection works here in Massachusetts, in states such as Delaware and Alaska which have enacted special legislation to protect certain domestic trusts, and in certain foreign jurisdictions. The program is presented by some of the foremost experts in the field. Learn how asset protection strategies work, the advantages of offshore or onshore trusts, and when to use one strategy over another.

Who should attend?

- ▶ Trusts and estates lawyers who wish to add a new dimension to their practice of law, whether as a new profit center or to avoid a malpractice claim for failure to advise on the relevant strategies available
- ▶ General practitioners who wish to learn how to issue-spot so as to learn when a referral is warranted to specialized counsel
- ▶ Family practice lawyers who wish to hone their skills regarding the spendthrift trust rule's application in a divorce setting
- ▶ Bankruptcy lawyers who want current information regarding the practical application of the Bankruptcy Act's rules on asset protection
- ▶ Business lawyers who need to understand the unique protections offered by different business entities
- ▶ Accountants who wish to understand the foreign entity reporting rules

You will learn...

- ▶ Timing issues: fraudulent transfer rules and transfers for fair value
- ▶ Trust techniques available for asset protection in Massachusetts
- ▶ Evolving standards for spendthrift trusts
- ▶ When a domestic asset protection trust, such as a Delaware trust, is a good idea
- ▶ When to consider a foreign trust and where to settle it
- ▶ Practical issues in implementing a foreign structure, including coordinating the advisors
- ▶ Tax reporting issues for foreign asset protection structures
- ▶ The different protections provided by corporations, partnerships, and limited liability companies
- ▶ Protection offered by domestic and foreign insurance products and amenities
- ▶ How bankruptcy refocuses the issues

Agenda and written materials

- ▶ Domestic Trusts
- ▶ Offshore Trusts
- ▶ Domestic and Offshore LLCs—Charging Orders
- ▶ Domestic and Offshore Insurance
- ▶ Tax Compliance Issues
- ▶ Bankruptcy
- ▶ Fraudulent Transfer Issues
- ▶ "Ask the Experts" Q&A Session

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BOSTON

8:30 a.m. – 12:30 p.m.,
Tuesday, February 23, 2010
MCLE Conference Center,
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