

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 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

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

Faculty

Kelly A. Aylward, Esq., *Lourie & Cutler, PC, Boston*, Cochair
Joshua S. Miller, Esq., CFP®, TEP, AEP®, *Acadia Management Co., Boston*, Cochair
Luke C. Bean, Esq., *Rico, Murphy, Diamond & Bean LLP, Natick*
Kevin M. Ellis, Esq., *Hemenway & Barnes LLP, Boston*
Amy R. Lonergan, Esq., *Day Pitney LLP, Boston*
Catherine Olender Neijstrom, Esq., *Gilmore, Rees & Carlson, PC, Wellesley*
Todd Povlich, CFA, ASA, *Management Planning, Inc., New York, NY*
Amy Schnitzer, Esq., *Bessemer Trust, Boston*
Christopher A. Voukides, Esq., *Day Pitney LLP, Boston*
Amiel Z. Weinstock, Esq., *AZW Law LLC, Brookline*

Dates & Location

LIVE WEBCAST

Tuesday, September 21;
Wednesday, September 22; &
Thursday, September 23, 2021
9:00 am–1:00 pm

Register at www.mcle.org
Program Number: 2220005WBC

REBROADCAST

Wednesday, October 6;
Thursday, October 7; &
Friday, October 8, 2021
1:00 pm–5:00 pm

Register at www.mcle.org
Program Number: 2220005RBC

REBROADCAST

Tuesday, October 12;
Wednesday, October 13; &
Thursday, October 14, 2021
10:00 am–2:00 pm

Register at www.mcle.org
Program Number: 2220005RB1

ON DEMAND WEBCAST

View after Thursday, October 14, 2021

Register at www.mcle.org
Program Number: 2220005WBA

Tuition *(includes written materials)*

- \$295
- \$265.50 MCLE Sponsor Members
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To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

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

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CLE Credits

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Register early!

For course agendas, hours, fees, and discounts, please refer to the respective seminar pages. The fee includes program instruction and all electronic written materials unless otherwise noted.

To gain early access to online materials, please register in advance of the program.


Upon registration, MCLE will e-mail a confirmation.

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If you're unable to participate in a program on the date for which you registered, you will receive an email 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 \$35 processing fee. Note that limited enrollment programs are an exception, cancellation of which require two weeks notice and are subject to a \$55 processing fee.

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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

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REFERENCE # 22-020

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