

Heckerling Institute on Estate Planning Review

Twin Cities Estate Planning Council Breakfast Meeting, Midland Hills Country Club
02.28.2017 | 7:30am

The Heckerling Institute on Estate Planning is the national gathering place for estate planners, including attorneys, charitable giving professionals, accountants, certified financial planners, investment advisors, trust officers, non-profit advisors, and educators. Join us for a recap of this year's Institute provided by Cindy Ackerman, a shareholder with Moss & Barnett's wealth preservation and estate planning practice area, including guidance on both the tax and non-tax issues involved in individual and estate planning; the increasingly important area of income tax planning for individuals, trusts, and estates; and the intersection of income and wealth transfer tax planning.

Agenda

1. Potential impact of 2016 election
2. Update on Section 2704 proposed regulations
3. Priority Guidance Plan
4. Non-tax recent developments
5. Estate Freezes - GRATs, Sales to intentionally defective trusts and preferred partnerships
6. Minimizing fiduciary risk
7. Planning considerations for foreign persons owning U.S. assets
8. Basis consistency

Pending approval for 1 hour of Minnesota insurance and CLE continuing education