Webinar for Professional Advisors

"Mathematics of Estate Planning" with Robert Keebler

Date:

Wednesday, July 20, 2016

Time:

3:00-4:00 p.m. Eastern
2:00-3:00 p.m. Central
1:00-2:00 p.m. Mountain
Noon-1:00 p.m. Pacific

Presentation topics:

- Gift, estate and GST tax rates and exemptions
- Tax exclusive nature of gift taxes
- Leveraging of the GST exemption
- Grantor Retained Annuity Trusts (GRATs)
- Installment sales to Intentionally Defective Grantor Trusts (IDGTs)
- Self-Canceling Installment Notes (SCINs)
- Private annuities
- "Tax Burn" SCIN℠ technique

Accountants:

If you have a site monitor at your viewing location and you pre-register to attend, you can earn CPE credit for attending this webinar. To pre-register, click on the link on the second page. In advance of the program, you will be emailed the appropriate forms to apply for credit. This course qualifies with NASBA for 1.0 hour of CPE credit in the category of Taxes.

About the Presenter

Robert S. Keebler, CPA/PFS, MST, AEP® (Distinguished) is a partner with Keebler & Associates, LLP, and is a 2007 recipient of the prestigious Accredited Estate Planners (Distinguished) award from the National Association of Estate Planners & Councils. He also is a member of the NAEPC Hall of Fame. He has been named by *CPA Magazine* as one of the Top 100 Most Influential Practitioners in the United States and one of the Top 40 Tax Advisors to Know During a Recession. His practice includes family wealth transfer and preservation planning, charitable giving, retirement distribution planning, and estate administration. Mr. Keebler frequently represents clients before the National Office of the Internal Revenue Service (IRS) in the private letter ruling process and in estate, gift and income tax examinations and appeals. Mr. Keebler has recently been quoted in *The New York Times* in an article titled "The 1040 Blues," where he provided insight on capital gains tax. Mr. Keebler has been a speaker at national estate planning and tax seminars for over 20 years including the AICPA's Estate Planning, High Income, Advanced Financial Planning Conferences, ABA Conferences, NAEPC Conferences, The Notre Dame Estate Planning Conference, and the Heckerling Estate Planning Institute.

NEW YORK LIFE

“The Mathematics of Estate Planning” with Robert Keebler

Upcoming Advisor Webinar:

Gary Post, JD
Wednesday, October 19, 2016 | 3:00-4:00 pm Eastern

Attend the Presentation:

Click this URL to attend the webinar

http://newyorklife.acms.com/e69fyqwlhk5/event/registration.html

To ensure the best possible webinar experience, we recommend the following:

Use Google Chrome: We strongly urge participants to use the Google Chrome web browser to register and attend this event.

Test your connection: It is critical that you test your connection, click on the link below:
http://arkadin-na.adobeconnect.com/common/help/en/support/meeting_test.htm

Listen via your speakers: Use your computer speakers or headset to listen to the webinar. If needed, you can also listen with your phone by dialing 1-888-517-2464 and entering the passcode 8721843.

Technical support: If you experience issues registering or attending, call the Webinar Support Hotline at 1-866-922-9566.

Mobile access - Adobe Connect runs on tablets and smartphones. Users just need to download the application from the App Store of their choice. For details, go to http://www.adobe.com/products/adobeconnect/apps/adobe-connectmobile.html

These presentations are for educational purposes only and are prepared for the general information and education of professional advisors who work with agents of New York Life Insurance Company. They are not intended for use with the general public. The presentations discuss current developments and set forth generally accepted concepts or principles. Program materials may include a discussion of tax-related topics prepared to assist in the promotion or marketing of the transactions or matters addressed. They are not intended (and cannot be used by any taxpayer) for the purpose of avoiding IRS penalties that may be imposed upon the taxpayer. No attempt is made to offer legal, accounting, tax, valuation, financial planning, investment, asset allocation or other professional advice, or to set forth solutions to individual problems. New York Life, its agents or employees may not give accounting, tax, or legal advice. For such advice and specific applications to individual cases, individuals must rely on the advice of their own professional advisors.

Robert Keebler is not affiliated with New York Life and are solely responsible for the content of these presentations, which may not necessarily represent the views of New York Life or its affiliates.

For CPE recipients: These one (1.0) hour advanced-level (group live) courses are offered for the benefit of practicing accountants with significant exposure to the subject and will focus on the development of in-depth knowledge necessary for proper consulting. These programs will provide the participant with an overview of technical topics related to estate planning. No advanced preparation is necessary.

New York Life Insurance Company is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors on its website: www.learningmarket.org. For more information regarding registration, refund, complaint and program cancellation, please contact New York Life Insurance Company representative Heather Davis at 972-720-6704.

AR07896_122015_SMRU 1695001 6.15.18