



Webinar for Professional Advisors

“Life Insurance Planning Opportunities After the Tax Cuts and Jobs Act”

with CPA Robert Keebler

Date:

Wednesday, July 17, 2019

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

[Click here to attend the presentation.](#)

Presentation topics:

This impactful webinar, delivered exclusively for professional advisors, will explore life insurance planning opportunities after the Tax Cuts and Jobs Act such as:

- 1) Utilizing the increased lifetime gift tax exclusion.
- 2) Comparing optimal retirement planning strategies.
- 3) Using C corporation retained earnings to fund a split-dollar arrangement.
- 4) Implementing business strategies utilizing key person and buy-sell agreements funded with life insurance.

Accountants:

If you have a course monitor at your viewing location and you pre-register to attend, you can earn CPE credit for attending this webinar. To pre-register, click the URL on the next page. Prior to the webinar, 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 Taxes.

About the presenter

Robert S. Keebler, CPA/PFS, MST, AEP® (Distinguished) is a partner with Keebler & Associates, LLP and is a recipient of the prestigious Accredited Estate Planners (Distinguished) award from the National Association of Estate Planners & Councils. 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, and he has received more than 250 favorable private letter rulings including several key rulings of “first impression.” He is the author of over 100 articles and columns and is the editor, author or co-author of many books and treatises on wealth transfer and taxation. 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 and Advanced Financial Planning Conferences. Others include ABA Conferences, NAPEC Conferences, The Notre Dame Estate Planning Conference and the Heckerling Estate Planning Institute.

Upcoming 2019 Advisor Webinar Series



Wednesday, November 13, 2019

Patricia Annino, JD, LLM

“Planning Issues and Challenges to Bridge the Generational Divide”

3:00-4:00 pm Eastern

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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.

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