

Estate Planning Webinar Series

Session 2-March 18, 2010

12-1 PM

Trusts: The Alphabet Soup of Estate Planning

Estate planning is one of the most fundamental and important services that an advisor can provide to clients. The ideal estate plan design assists the client, to the maximum extent possible, to minimize the burden of gift and estate taxes and to protect assets from the threat of existing and potential creditors.

In this session, Offit Kurman Estate Planning Attorney Maurice Offit will provide specific information that will help advisors gain a better understanding of the types of trusts, the purpose of each, how each works, and best candidates for each, so the advisor is able to spot opportunities for his or her clients.

During the webinar, you will learn about:

- why trusts are created
- types of trusts-revocable/irrevocable
- specific trusts-credit shelter, dynasty, disclaimer, GRAT, CRUT, etc
- trustee issues
- attorney and corporate trustee fees
- financial advisor trustees
- trust tax returns
- and much more.



*Presenter **Maurice L. Offit, Esq.** is a co-Founder and President of **Offit Kurman Attorneys At Law**, Chair of the firm's Estates & Trusts Department and a member of the firm's Management Committee. As Chair of the Estates & Trusts Department, Mr. Offit counsels a large number of clients who share an interest in minimizing estate taxes and protecting their assets from the claims of creditors. With a J.D. from Georgetown University Law Center, and a B.A. from Case Western Reserve University, Mr. Offit has more than thirty years of experience in designing estate and asset protection plans for his clients. Mr. Offit is a Certified Public Accountant and is a member of the Baltimore Estate Planning Council and the Offshore Professional Institute.*

This session has been accepted for one hour of CFP CE credit

Register at http://www.fpamd.org/events_detail.php?ID=118&tab=req
(IF YOU ARE A CFP DESIGNEE, DON'T FORGET TO PROVIDE YOUR LICENSE #)

Members/non-Members: no charge for the session, thanks to



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