

Transferring Wealth ©

Objective: This intermediate level course drills down into some of the concepts and ideas introduced in our family wealth management course.

Learning objectives:

- Note the importance of educating all family members and getting them involved
- Explain numerous techniques for transferring a family's wealth
- Describe the advantages, and disadvantages, of wealth transfer techniques
- Note whether the family business should be transferred or sold
- Highlight the relevant estate, gift, income, and generation-skipping tax provisions
- List the advantages and disadvantages of using a family office
- Note the pitfalls to avoid
- Learn the lessons from court cases and IRS rulings

CPE: 8 hours

Level: Intermediate

Category: Technical Consulting

Prerequisites: None

Instructor: Dennis J. Gerschick

Code: TRFW