

**HTI ANYWHERE Virtual Program (November 4-7, 2024)**  
**61<sup>st</sup> Annual Hawaii Tax Institute – CE Credits Offered Online**

**(Hawaii Standard Time)**

- Course Descriptions and Speakers can be found in the In-Person Conference Brochure
- **Please Note When Scheduling: Hawaii Does Not Have Daylight Savings Time-Change**

**Course  
Duration  
Min/Hrs**

**CE Credit Available for HTI Anywhere Registrants:**

**ESQ** – Up to 19 hours General Credits and 7 hours of Ethics and also CA Tax & EP Specialization credits  
**CPA** – Up to 22.8 CPE Hours Field of Study = Taxes and 7 hours of Behavioral Ethics (NASBA Group Internet Based)  
**CTFA** – Up to 19 Hours CE Credit – American Banker’s Association  
**CFP** - Up to 19 Hours of CE Credit – CFP Board  
**CWS** - Up to 19 Hours CE Credit – Cannon Financial  
**EA** – Up to 22.8 CPE Hours Field of Study = Taxes and 7 hours of Behavioral Ethics (Internal Revenue Service Credits)

**MONDAY, November 4, 2024 (Hawaii Standard Time)**

8:15a – 9:45a Recent Developments and Current Trends in Wealth Transfer Planning

90

(Break 15 minutes)

10:00a - 11:00a Family Dynamics, Ethical Considerations and Intergenerational Conflict: Family Governance as a Tool for Preserving Family Wealth and Harmony (60 min CPE/Legal Ethics)

60

11:00a – 12:00p The Nonprofit Hour of Power – Current Developments, Recent Trends and Hot Topics in Tax-Exempts and Charitable Giving

60

(Break – 90 minutes lunch)

1:30p – 2:30p Is the Tide Turning? Current Developments Regarding International Information Return Penalties and Ethical Considerations (60 min CPE/Legal Ethics)

60

2:30p – 3:30p Probate Judges and Lawyers Don’t Always Think Alike – Are Probate Judges’ Brains “Abby Normal”?

60

(Break 30 minutes)

4:00p – 5:00p Wealth Transfer Planning for Retirement Benefits: Looking at the Full Spectrum

60

390 min/6.5 hrs

**TUESDAY, November 5, 2024 (Hawaii Standard Time)**

8:00a – 9:15a Planning with No, Low, and “Negative” Basis Assets (Putting It on & Taking It Off)

75

9:15a – 10:45a Getting to the Finish Line: The Importance of an Appraisal Report, Consistency in Tax Reporting, and Ethical Considerations (90 min CPE/Legal Ethics)

90

(Break 15 minutes)

11:00a – 12:00p How the IRS is Changing and What to Expect in the Future

60

225 min/3.75 hrs

**WEDNESDAY, November 6, 2024 (Hawaii Standard Time)**

8:00a – 9:30a Dealing with Promissory Notes in a Wealth Transfer Strategy and Ethical Considerations (90 min CPE/Legal Ethics)

90

9:30a – 10:30a Star-Studded Estates: Celebrity Wealth Transfer Cases Unveiled

60

(Break 15 minutes)

10:45a – 12:00p A Taste of Asia: International Wealth Transfer and Legacy Planning in Reverse

75

225 min/3.75 hrs

**THURSDAY, November 7, 2024 (Hawaii Standard Time)**

8:00a – 9:00a Complying with Corporate Transparency: Act Reporting Rules and Implications for Family Offices and Their Advisors

60

9:00a – 10:00a Practical and Ethical Issues with Loss of Capacity (60 min CPE/Legal Ethics)

60

10:00a – 11:00a “Don’t Bank On It”: GenAI’s Risks to Earning and Transferring Wealth Including Ethical Considerations (60 min CPE/Legal Ethics)

60

(Break 30 minutes)

11:30a – 12:30p Combining Trusts to Reduce Complexity and Costs

60

12:30a - 1:30p Fools Rush In

60

300 min/5.0 hrs

**Total Minutes Offered**

**1140**

**Total Hours Offered**

**19**