

**HTI ANYWHERE Virtual Program**  
**60<sup>th</sup> Annual Hawaii Tax Institute – CE Credits Offered Online**  
**November 6-9, 2023**

**Virtual Schedule – (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 90 minutes of Ethics and also CA Tax & EP Specialization credits  
 CPA – Up to 22.8 CPE Hours Field of Study = Taxes and 90 minutes 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 90 minutes of Behavioral Ethics (Internal Revenue Service Credits)

**MONDAY, November 6, 2023 (Hawaii Standard Time)**

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

90

(Break 15 minutes)

10:00a - 11:00a Your Emergency Escape Kit: Planning for Financial Uncertainty

60

11:00a – 12:00p Update on Tax Exempt Organizations and Charitable Giving

60

(Break – 90 minutes lunch)

1:30p – 2:30p R-E-S-P-E-C-T, Find Out What My Will Really Means To Me

60

2:30p – 3:30p Those Gnarly Elections – Don’t Get Caught Looking in the Rear View Mirror

60

(Break 30 minutes)

4:00p – 5:00p Understanding the Sandbox That All Wealth Transfer Advisors Play In

60

390 min/6.5 hrs

**TUESDAY, November 7, 2023 (Hawaii Standard Time)**

8:00a – 9:15a Planning, Audit and Litigation: Using Valuation Discounts to Transfer Wealth

75

9:15a – 10:45a QSBS: Quest for Quantum Exclusions (Queries, Qualms, Qualifications & QOZ)

90

(Break 15 minutes)

11:00a – 12:00p Transferring Wealth for the Middle Rich

60

225 min/3.75 hrs

**WEDNESDAY, November 8, 2023 (Hawaii Standard Time)**

8:00a – 9:30a AI, Its Application to Professional Services & Ethical Considerations (90 min CPE/Legal Ethics)

90

9:30a – 10:30a From Death to Distribution – Federal Tax Requirements and Potential Contributions

60

(Break 15 minutes)

10:45a – 12:00p Asia and U.S. Cross Border Wealth Transfer Planning

75

225 min/3.75 hrs

**THURSDAY, November 9, 2023 (Hawaii Standard Time)**

8:00a – 9:00a Planning for Retirement Benefits After SECURE Act and Proposed Regulations

60

9:00a – 10:00a Tax Issues You Might Not Think About When Planning a Wealth Transfer Strategy

60

10:00a – 11:00a Divorcing the Highly Planned Family: Addressing Irrevocable Trusts

60

(Break 30 minutes)

11:30a – 12:30p Employee Retention Credit Audits and Investigation – The Tsunami is Coming

60

12:30a - 1:30p In Sick and in Health: Advance Health Care Directives and the New UHCDA

60

300 min/5 hrs

**Total Minutes Offered**  
**Total Hours Offered**

**1140**  
**19**