

## HTI ANYWHERE

### 59<sup>th</sup> Annual Hawaii Tax Institute – CE Credits Offered Online

**November 7-10, 2022**

#### Full Virtual Schedule – HTI Anywhere

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

**Attorney** – Up to 19 hours General Credits & 1 Hour of Ethics (Also CA Specialty Tax & Estate Planning)

**CPA** – Up to 19 Hours Field of Study = Taxes and 1 Hour 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 – Cannon Institute

**EA** – 1 hour – Internal Revenue Service Approved

**Course  
Duration**

##### **Monday, November 7, 2022**

8:00 Recent Developments Facing All Wealth Transfer Advisors

1.5

(Break 15 minutes)

1.0

1.0

10:00 Next-Gen Planning: What Advisors Are Discussing With Gen X,Y&Z Clients

11:00 Retirement Accounts: Planning Optimal Family and Charitable Outcomes

1.0

1.0

(Break – 90 minutes lunch)

1:30 Current Developments in Charitable Giving and Nonprofits

2:30 The Modern Art of Delegation: Delegation of Investment Management Functions by a Trustee in the mid-21<sup>st</sup> Century

1.0

(Break 30 minutes)

4:00 Using the IRS’s Taxpayer Advocate Service to Help Taxpayers Across the Country

##### **Tuesday, November 8, 2022**

8:00 Valuation – How to Read and Critique an Appraiser’s Appraisal

1.25

9:15 Fun and Interesting Strategies to Address Common Income Tax Situations in Estate Planning

1.5

(Break 15 minutes)

1.0

11:00 Cross Border Tax Planning for Clients with Ties to Japan and Other Asian Counties

##### **Wednesday, November 9, 2022**

8:00 FBAR Reporting: Trends, Pitfalls, and Enforcement. What you need to discuss with your Client

1.5

9:30 Attacking and Defending Trustees

1.0

(Break 15 minutes)

1.25

10:45 Forty-Three of the Best Creative Tax Planning Ideas We See Out There For Trusts

##### **Thursday, November 10, 2022**

8:00 Over-Rated? How Surging Interest Rates & Slow Growth May Radically Change Wealth Transfer Planning

1.0

9:00 Mission Impossible! Solving the Estate and Income Tax Tradeoff

1.0

10:00 Designing Irrevocable Trusts to Protect Assets From Being Reached in a Divorce

1.0

(Break 30 minutes)

1.0

11:30 The Aftermath: Dealing with Promissory Notes During Life and After Death Resulting from Intentionally Defective Grantor Trust Sales

1.0

12:30 When Aggressive Tax Planning Becomes Criminal Conduct and Ethical Considerations

**Total HTI Anywhere Online Hours Offered**

**19.0**