| 2022 CERTIFIED FINANCIAL PLANNER BOARD OF STANDARDS<br>59th Hawaii Tax Institute = Sponsor 1801 --- November 6-10, 2022 | | |
|---|---|---|
| **Program Name** | **Program** | **Hours** |
| Fiduciary Income and Entity Taxation Workshop | 307921 | 5 |
| Federal Estate, Gift and GST Taxation Workshop | 307922 | 5 |
| The Fundamentals: Common and Practical Planning and Gifting Techniques for All Wealth Transfer Advisors | 307560 | 1.5 |
| Recent Developments Facing All Wealth Transfer Advisors | 307561 | 1.5 |
| Next-Gen Planning: What Advisors Are Discussing with Gen X, Y & Z Clients | 307562 | 1 |
| Retirement Accounts: Planning Optimal Family and Charitable Outcomes | 307563 | 1 |
| Tax Court Updates and Understanding the Role of the Tax Court in Our Federal System of Taxation | 307564 | 1 |
| Current Developments in Charitable Giving and Nonprofits | 307565 | 1 |
| The Modern Art of Delegation: Delegation of Investment Management Functions by a Trustee in the mid-21st Century | 307566 | 1 |
| Using the IRS's Taxpayer Advocate Service to Help Taxpayers Across the Country | 307567 | 1 |
| Valuation – How to Read and Critique an Appraiser's Appraisal | 307568 | 1.5 |
| Fun and Interesting Strategies to Address Common Income Tax Situations in Estate Planning | 307569 | 1.25 |
| Cross Border Tax Planning for Clients with Ties to Japan and Other Asian Countries | 307570 | 1 |
| Challenges Facing the IRS and Impact of the Inflation Reduction Act Funds | 307571 | 1 |
| Planning for Privacy in a Public World: The Ethics and Mechanics of Protecting Your Client's Privacy and Personal Security | 307572 | 1 |
| Foreign Trusts and Gifts – Reporting Obligations, Compliance Issues, and Challenging Those Egregious Penalties! | 307573 | 1 |
| Exploring the Fiduciary's Duty to Invest Trust Assets | 307574 | 1 |
| The Natural Tension Between Business Development and Trust Administrators During the Due Diligence and Onboarding Process and Tips on How to Resolve Things | 307575 | 1 |
| Taxation of Cryptocurrency and Non-Fungible Tokens (NFTs) with Planning Suggestions | 307576 | 1 |
| No Good Deed Goes Unpunished and Ethical Considerations | 307577 | 1 |
| IRS Target List – Avoiding Audit: How the Transfer Tax Spaghetti is Made | 307578 | 1 |
| Tax Considerations of Converting Grantor Trusts to Nongrantor Trusts | 307579 | 1 |
| The Real Scoop: An Update on Charitable Giving and a Comparison of Private Foundations and Donor Advised Funds | 307580 | 1 |
| QSBS: Quest for Quantum Exclusions (Queries, Qualms, Qualifications & QOZ | 307581 | 1 |
| Starting, Maintaining or Growing a Solo or Small Firm Estate Planning Practice | Denied | --- |
| Red Flags: Understanding the Threats to Your Client's Wealth and Personal Safety and Helpful Hints on How to Protect Against Them | 307583 | 1 |
| Business, Legacy, and Taxes: Strategies for Efficient Intra-Family Transfers or Third Party Sales of Closely Held Businesses | 307584 | 1 |
| How Trustees and Wealth Transfer Advisors Can Use Property and Casualty Coverage for Asset Protection | 307585 | 1 |
| "So, You Want to Give Us Your Picasso?" How to Recognize the Benefits and Pitfalls of Gifts of Art | 307586 | 1 |
| FBAR Reporting: Trends, Pitfalls, and Enforcement. What you need to discuss with your clients | 307587 | 1.5 |
| Attacking and Defending Trustees | 307924 | 1 |
| Forty-Three of the Best Creative Tax Planning Ideas | 307925 | 1.25 |
| IRS Policy, Protocol and Potpourri of Guidance in Estate and Gift Taxation and Wealth Transfer | 307938 | 1 |
| Old Dog or New Trick? The Evolution of Joint Spousal Trusts in Today's Wealth Transfer Strategies | 307939 | 1 |
| Fiduciary Accounting Nightmares and How to Avoid Them | 307940 | 1 |
| Where Purpose Meets Planning | 307941 | 1 |
| Premium Financing – Advanced Planning Techniques for the Ultra High Net Worth Client | 307942 | 1 |
| Drafting and Planning for Trusts to hold IRAs under the SECURE Act | 307943 | 1 |
| Where There's a Will, There's a (New) Way: a Primer on Electronic Estate Planning and Wealth Transfer Documents | 307944 | 1 |
| Correcting Planning Mistakes and Shoring Up Messy Wealth Transfer Structures | 307945 | 1 |
| Video Killed the Radio Star & Digital Assets are Killing the Paper Trial: A Primer on Digital Assets - How to Plan and Administer Them | 307946 | 1 |
| 529 Plans: A Compelling Tax and Estate Planning Tool | 307947 | 1 |
| Sweet Home Alabama: Creative Strategies to Use and Pitfalls to Avoid when Gifting Real Estate to Nonprofits | 307948 | 1 |
| Tax Efficient Investing for the Various Trusts and Wealth Transfer Strategies Being Credited | On-Hold | 1 |
| Family Dynamics & Intergenerational Conflict: Preserving Family Wealth and Harmony | 307950 | 1 |
| First, Say "I'm Sorry" - Exploring the Psychological, Legal and Ethical Impact of Grief in Wealth Transfer Strategies and Structures | 307951 | 1 |
| The Flexible Beneficiary Trust for Qualified Plans and IRAs | 307952 | 1 |
| Time to Revisit Your Client's Choice of Entity for Tax and Compliance Purposes | 307953 | 1 |
| Over-Rated? How Surging Interest Rates and Slow Growth May Radically Change Wealth Transfer Planning | 307954 | 1 |
| Impossible? Solving the Estate and Income Tax Tradeoff | 307955 | 1 |
| Designing Irrevocable Trusts to Protect Assets from Being Reached in a Divorce | 307956 | 1 |
| The Aftermath: Dealing with Promissory Notes During Life and After Death Resulting from Intentionally Defective Grantor Trust Sales | 307957 | 1 |
| When Aggressive Tax Planning Becomes Criminal Conduct an Ethical Considerations | 307958 | 1 |