ABA - CTFA Sessions

59th Annual Hawaii Tax Institute - November 6-10, 2022

Date	Sessions	Hrs	CTFACredits
	Pre-Conference Course - Registant Selects One	*5*	*5.50*
11/6/2022	Fiduciary Income and Entity Taxation Workshop		5.50
	Fiduciary Estate, Gift and GST Taxation Workshop		5.50
11/7/2022	Workshop - The Fundamentals: Common and Practical Planning and Gifting Techniques for All Wealth Transfer Advisors	1.5	2.00
	Recent Developments Facing All Wealth Transfer Advisors	1.5	2.00
	Next-Gen Planning: What Advisors are Discussing with Gen X, Y & Z Clients	1	1.25
	Retirement Accounts: Planning Optimal Family and Charitable Outcomes	1	1.25
	Luncheon: Tax Court Updates and Understanding the Role of the Tax Court in Our Federal System of Taxation	1	1.25
	Current Developments in Charitable Giving and Nonprofits	1	1.25
	The Modern Art of Delegation: Delegation of Investment Management Functions by a Trustee in the mid-21st Century	1	1.25
	Using the IRS's Taxpayer Advocate Service to Help Taxpayers Across the Country	1	1.25
11/8/2022	Valuation - How to Read and Critique an Appraiser's Appraisal	1.25	1.50
	Fun and Interesting Strategies to Address Common Income Tax Situations in Estate Planning	1.5	2.00
	Cross Border Tax Planning for Clients with Ties to Japan	1	1.25
	Luncheon: Federal Funding of the Internal Revenue Service and How the Monies Will Be Spent	1	1.25
	Track Workshops - Registrant Selects One	*1*	
	Compliance Track - Planning for Privacy in a Public World: The Ethics and Mechanics of Protecting Your Client's Privacy and Personal Security		1.25
	Controversies Track - Foreign Trusts and Gifts - Reporting Obligations, Compliance Issues, and Challenging Those Egregious Penalties!		1.25
	Fiduciary Track - Exploring the Fiduciary's Duty to Invest Trust Assets		1.25
	Financial Track - The Natural Tension Between Business Development and Trust Administrators During the Due Diligence and Onboarding Process and Tips on How to Resolve Things		1.25
	Tax Track - Taxation of Cryptocurrency and Non-Fungible Tokens (NFTs) with Planning Suggestions		1.25
	Track Workshops - Registrant Selects One	*1*	
	Compliance Track - No Good Deed Goes Unpunished		1.25
	Controversies Track - IRS Target List - Avoiding Audit: How the Transfer Tax Spaghetti is Made		1.25
	Fiduciary Track - Tax Considerations of Converting Grantor Trusts to Nongrantor Trusts		1.25
	Financial Track - The Real Scoop: An Update on Charitable Giving and a Comparison of Private Foundations and Donor Advised Funds		1.25
	Tax Track - QSBS: Quest for Quantum Exclusions (Queries, Qualms, Qualifications & QOZ)		1.25
	Track Workshops - Registrant Selects One	*1*	
	Compliance Track - Starting, Maintaining or Growing a Solo or Small Firm Estate Planning Practice		1.25
	Controversies Track - Red Flags: Understanding Threats to Client's Wealth & Personal Safety- Helpful Hints How to Protect Against Them		1.25
	Fiduciary Track - Business, Legacy, and Taxes: Strategies for Efficient Intra-Family Transfers or Third Party Sales of Closely Held Businesses		1.25
	Financial Track - How Trustees and Wealth Transfer Advisors Can Use Property and Casualty Coverage for Asset Protection		1.25
	Tax Track - "So, You Want to Give Us Your Picasso?" How to Recognize the Benefits and Pitfalls of Gifts of Art		1.25
11/9/2022	FBAR Reporting: Trends, Pitfalls, and Enforcement. What you need to discuss with your clients	1.5	2.00
	Attacking and Defending Trustees	1	1.25
	Forty-Three of the Best Creative Tax Planning Ideas	1.25	1.50

		Luncheon: The US Financial Markets, Interest Rates, Inflation, Corporate Earnings, Housing Market and More	1	1.25
		Track Workshops - Registrant Selects One	*1*	
		Compliance Track - Old Dog or New Trick? The Evolution of Joint Spousal Trusts in Today's Wealth Transfer Strategies		1.25
		Controversies Track - Fiduciary Accounting Nightmares and How to Avoid Them		1.25
		Fiduciary Track - Where Purpose Meets Planning		1.25
		Financial Track - Premium Financing - Advanced Planning Techniques for the Ultra High Net Worth Client		1.25
		Tax Track - Drafting and Planning for Trusts to hold IRAs under the SECURE Act		1.25
		Track Workshops - Registrant Selects One	*1*	
		Compliance Track - Where There's a Will, There's a (New) Way: a Primer on Electronic Estate Planning and Wealth Transfer Documents		1.25
		Controversies Track - Correcting Planning Mistakes and Shoring Up Messy Wealth Transfer Structures		1.25
		Fiduciary Track - Video Killed Radio Star & Digital Assets Killing Paper Trial: A Primer on Digital Assets - How to Plan & Administer Them		1.25
		Financial Track - 529 Plans: A Compelling Tax and Estate Planning Tool		1.25
		Tax Track - Sweet Home Alabama: Creative Strategies to Use and Pitfalls to Avoid when Gifting Real Estate to Nonprofits		1.25
		Track Workshops - Registrant Selects One	*1*	
		Compliance Track - Tax Efficient Investing for the Various Trusts and Wealth Transfer Strategies Being Credited		1.25
		Controversies Track - Family Dynamics & Intergenerational Conflict: Preserving Family Wealth and Harmony		1.25
		Fiduciary Track - First, Say "I'm Sorry" - Exploring the Psychological, Legal and Ethical Impact of Grief in Wealth Transfer Strategies and Structures		1.25
		Financial Track - The Flexible Beneficiary Trust for Qualified Plans and IRAs		1.25
		Tax Track - Time to Revisit Your Client's Choice of Entity for Tax and Compliance Purposes		1.25
11/10/2022		Over-Rated? How Surging Interest Rates and Slow Growth May Radically Change Wealth Transfer Planning	1	1.25
		Mission Impossible? Solving the Estate and Income Tax Tradeoff	1	1.25
		Designing Irrevocable Trusts to Protect Assets from Being Reached in a Divorce	1	1.25
		The Aftermath: Dealing with Promissory Notes During Life and After Death Resulting from Intentionally Defective Grantor Trust Sales	1	1.25
		When Aggressive Tax Planning Becomes Criminal Conduct	1	1.25
		TOTAL	34.5	
Pre-Conference-CTFA's may claim up to __42.75____ CTFA credits depending on the sessions attended.				
Conference only-CTFA's may claim up to ___37.25__ CTFA credits depending on the sessions attended.				