| 2019 CERTIFIED FINANCIAL PLANNER BOARD OF STANDARDS<br>56th Hawaii Tax Institute = Sponsor 1801 --- November 3-7, 2019 | | |
|---|---|---|
| **Program Name** | **Program** | **Hours** |
| Fiduciary Income and Wealth Transfer Taxation Workshop | 266152 | 5 |
| Estate and Gift Tax after the Tax Cuts and Jobs Act | 266153 | 5 |
| Everything You Wanted To Know about Fiduciary Accounting but Were Afraid To Ask, Including Ethical Considerations | 266154 | 1.5 |
| Recent Developments Facing All Wealth Transfer Advisors and Current Transfer Tax Changes under the Trump Tax Cuts and Jobs Act | 266155 | 1.5 |
| Not Your Parents' Estate Plan: Planning Considerations for Next Gen Clients | 266156 | 1 |
| Caution Trustees - Beware of Unresolved Tax Liabilities of Incapacitated Taxpayers and Decedents; Ethical Considerations | 266157 | 1 |
| The Role and Importance of the Joint Committee on Taxation to Our Nation's System of Taxation | 266214 | 1 |
| Current Developments and Trends under the Trump Tax Cuts and Jobs Act Affecting Nonprofits and Foundations | 266158 | 1 |
| Top Tax and Wealth Transfer Strategies after "Tax Reform" (Sorting through the COVFEFE) | 266159 | 1 |
| From the Inside Out: Psychological, Ethical and Legal Aspects of Elderhood | 266160 | 1 |
| The 10 Commandments of International Tax and Wealth Transfer Planning | 266161 | 1.5 |
| A Foreign Perspective - Income Taxation and Wealth Transfer Systems in Asia | 266162 | 1.25 |
| A Tale of Two Taxpayers - Discount & Premium Valuations, Reporting & Defending, & Other Current Developments with the Tax Court | 266163 | 1 |
| Tariff Trade Wars and the Global Economies - What Does It All Mean and Where Do We Go from Here? | 266215 | 1 |
| Charities Texting and Tweeting: Structuring for Social Movements - What Can Go Wrong? | 266164 | 1 |
| Planning/Pitfalls with SLATs | 266165 | 1 |
| Taxation of Trust and Estates Settlements-Estate, Gift, GST, Income Tax, and Other Issues | 266166 | 1 |
| The Virtual Private Trust Company and the Family Office | 266167 | 1 |
| Preparing Your Clients' Closely Held Business for Sale or for the Next Generation | 266168 | 1 |
| Understanding Income Taxation and Wealth Transfer Taxation in Japan/South Korea | 266169 | 1 |
| IRC Section 1446: It's All about Withholding, Disclosing, and Remitting the Tax | 266170 | 1 |
| Evolution of the Role of Community Foundations | Denied | //////// |
| Protecting Client Data: Ethics, Security, and Practicality for All Wealth Transfer Advisors | 266172 | 1 |
| The Indicia of Financial Elder Abuse | 266173 | 1 |
| Upstream Planning for Unused Exclusions and Ethical Considerations | 266174 | 1 |
| Using the Tools from Our Daily Toolbox for Asset Protection Objectives | 266175 | 1 |
| Understanding Income Taxation and Wealth Transfer Taxation in Hong Kong/Singapore/Peoples Republic of China | 266176 | 1 |
| Separating from Your Pass-Through Partners and Deferring the Capital Gain Using IRC Section 1031 and More | 266177 | 1 |
| Comparing Different Charitable Vehicles | 266178 | 1 |
| Benefits of Tennessee Trust Laws | 266179 | 1 |
| Trusts and Divorce | 266180 | 1 |
| Optimizing Lifetime Gifting: Advising Clients in Uncertain Times | 266181 | 1 |
| Earth Wind and Fire: Safeguarding Art, Antiques, and Jewelry | 266182 | 1 |
| Domesticating the Foreign Estate Plan and Translating It into American English | 266183 | 1 |
| IRS Voluntary Disclosure Program and Updates on the Other Offshore Procedures | 266184 | 1 |
| Current Developments and Trends in Retirement Accounts, IRAs, and Other Qualified Plans | 266185 | 1.5 |
| The Death of Jeffrey Epstein Raises Many Medical, Legal, and Ethical Wealth Transfer Considerations | 266186 | 1 |
| The Tremendous Estate and Income Tax Advantages of Using Trusts in which the Beneficiary Is the Deemed Income Tax Owner | 266187 | 1.25 |
| Purpose and Mission of Hawaii's Highest Court in the Land; The Supreme Court | 266216 | 1 |
| A Study of High Net Worth Philanthropy: What Does It all really Mean? | 266188 | 1 |
| The Use of S Corporations in Estate Planning | 266189 | 1 |
| The Planner vs. The Enforcer: Issues which Cause Audits of Estate and Gift Tax Returns | 266190 | 1 |
| It Isn't over till the Post-Mortem Planning Is Done | 266191 | 1 |
| Managing Highly Appreciated Assets | 266192 | 1 |
| New Rules for Avoiding Traps that Could Make Life Insurance Subject to Income Tax | 266193 | 1 |
| Section 1202 Qualified Small Business Stock-Recent Developments | 266194 | 1 |
| Impact Investing and ESG Integration | 266195 | 1 |
| Powerful Trends & Adv w/ Changing Situs of a Trust Utilizing Modern Reformation/Modification, Restatement, & Decanting Strategies | 266196 | 1 |
| Powers of Attorney - Myths, Management, and Litigation | 266197 | 1 |
| Taking Care of Those in Need: All You Wanted To Know about Special Needs Trust Planning | 266198 | 1 |
| Private Investor Advantage: 18 Strategies for Family Offices and Investors To Become More Effective | 266199 | 1 |
| Accelerated Benefit Riders on Life Policies | 266200 | 1 |
| Qualified Opportunity Zones Tax Benefits and Planning | 266201 | 1 |
| Crowdfunding for Charity: Federal Tax and State Charitable Solicitation Issues | 266202 | 1 |
| Does Your Wealth Transfer Strategy Create a Legacy | 266203 | 1 |
| Family Dynamics, Ethical Considerations, and Intergenerational Conflict: Preserving Family Wealth and Harmony | 266204 | 1 |
| Undoing the formerly Outstanding Estate Plan for Income Tax Planning | 266205 | 1 |
| Basics of Trust Administration Regarding Tangible Personal Property | 266206 | 1 |
| Life Insurance for the Non-Resident Alien and/or Foreign National Client | 266207 | 1 |
| Searching for Basis in Estate Planning | 266208 | 1 |
| A Washington D.C. Update - Current Income Tax Rules, Changes and Trends under the Trump Tax Cuts and Jobs Act | 266209 | 1 |
| Lessons Learned from the Past - Don't Repeat the Same Mistakes of 2010 | 266210 | 1 |
| Planning for the Last Chapter: Elder Law Life Care Planning as a Multifaceted Approach with a Legal/Medical Team | 266211 | 1 |
| Moving beyond Paper - How Technology (and Blockchain) Will Improve Wealth Transfer Security and Efficiency | 266212 | 1 |
| Winning the Jackpot - A Conversation with Your Clients They Will Always Remember! | 266213 | 1 |