56th Annual Hawaii Tax Institute - **CA Legal Specialist - TAX Sessions**

November 3-7, 2019

Date	Session	Hrs	A	B	C	D	E	F	G	H	I	J	K	L
11/3/2019	Pre-Conference Fiduciary Income and Wealth Transfer Taxation Workshop	5	2				2					1		
	Pre-Conference Estate and Gift Tax after the Tax Cuts and Jobs Act	5	2				2					1		
11/4/2019	Pre-Conference Workshop - Everything You Wanted To Know about Fiduciary Accounting but Were Afraid To Ask, Including Ethical Considerations	1.5								0.5		0.5	0.5	
	Recent Developments Facing All Wealth Transfer Advisors and Current Transfer Tax Changes under the Trump Tax Cuts and Jobs Act	1.5								0.75		0.75		
	Not Your Parents' Estate Plan: Planning Considerations for Next Gen Clients	1								1				
	Caution Trustees - Beware of Unresolved Tax Liabilities of Incapacitated Taxpayers and Decedents; Ethical Considerations	1	0.25				0.25			0.25				0.25
	Luncheon: The Role and Importance of the Joint Committee on Taxation to Our Nation's System of Taxation	1										1		
	Current Developments and Trends under the Trump Tax Cuts and Jobs Act Affecting Nonprofits and Foundations	1								0.25	0.5	0.25		
	Top Tax and Wealth Transfer Strategies after "Tax Reform" (Sorting through the COVFEFE)	1	0.25							0.5		0.25		
	From the Inside Out: Psychological, Ethical and Legal Aspects of Elderhood	1								0.25		0.25		0.5
11/5/2019	The 10 Commandments of International Tax and Wealth Transfer Planning	1.25								0.5		0.25	0.5	
	A Foreign Perspective - Income Taxation and Wealth Transfer Systems in Asia	1.5	0.5							0.25		0.25	0.5	
	A Tale of Two Taxpayers - Discount/Premium Valuations, Reporting/Defending, Other Current Developments w/ Tax Court	1								0.5			0.5	
	Luncheon: Tariff Trade Wars and the Global Economies - What Does It All Mean and Where Do We Go from Here?	1										0.5	0.5	
	Track Workshops - Registrants Pick One		A	B	C	D	E	F	G	H	I	J	K	L
	Charitable Track - Charities Texting and Tweeting: Structuring for Social Movements - What Can Go Wrong?	1									1			
	Compliance Track - Planning/Pitfalls with SLATs	1								1				
	Controversies Track - Taxation of Trust and Estates Settlements-Estate, Gift, GST, Income Tax, and Other Issues	1	0.5							0.5				
	Fiduciary Track - The Virtual Private Trust Company and the Family Office	1								0.5		0.5		
	Financial Track - Preparing Your Clients' Closely Held Business for Sale or for the Next Generation	1	0.25	0.5						0.25				
	Global Track - Understanding Income Taxation and Wealth Transfer Taxation in Japan/South Korea	1											1	
	Tax Track - IRC Section 1446: It's All about Withholding, Disclosing, and Remitting the Tax	1										0.5	0.5	
	Track Workshops - Registrants Pick One		A	B	C	D	E	F	G	H	I	J	K	L
	Charitable Track - Evolution of the Role of Community Foundations	1									0.5	0.5		
	Compliance Track - Protecting Client Data: Ethics, Security, and Practicality for All Wealth Transfer Advisors	1								0.5		0.5		
	Controversies Track - The Indicia of Financial Elder Abuse	1								0.5		0.5		
	Fiduciary Track - Upstream Planning for Unused Exclusions and Ethical Considerations	1	0.25							0.25		0.25		0.25
	Financial Track - Using the Tools from Our Daily Toolbox for Asset Protection Objectives	1								0.5		0.5		
	Global Track - Understanding Income Tax and Wealth Transfer Taxation in Hong Kong/Singapore/Peoples Republic of China	1											1	
	Tax Track - Separating from Your Pass-Through Partners and Deferring the Capital Gain Using IRC Section 1031 and More	1	0.5									0.5		
	Track Workshops - Registrants Pick One		A	B	C	D	E	F	G	H	I	J	K	L
	Charitable Track - Comparing Different Charitable Vehicles	1									1			
	Compliance Track - Benefits of Tennessee Trust Laws	1								0.5		0.5		
	Controversies Track - Trusts and Divorce	1								0.5		0.5		
	Fiduciary Track - Optimizing Lifetime Gifting: Advising Clients in Uncertain Times	1	0.25							0.25		0.5		
	Financial Track - Earth Wind and Fire: Safeguarding Art, Antiques, and Jewelry	1								0.5		0.5		
	Global Track - Domesticating the Foreign Estate Plan and Translating It into American English	1											1	
	Tax Track - IRS Voluntary Disclosure Program and Updates on the Other Offshore Procedures	1	0.5									0.5		
11/6/2019	Current Developments and Trends in Retirement Accounts, IRAs, and Other Qualified Plans	1.5								1		0.5		
	The Death of Jeffrey Epstein Raises Many Medical, Legal, and Ethical Wealth Transfer Considerations	1	0.5							0.25		0.25		
	The Tremendous Estate & Income Tax Advantages of Using Trusts in which the Beneficiary Is the Deemed Income Tax Owner	1.25	0.75							0.25		0.25		
	Luncheon: Purpose and Mission of Hawaii's Highest Court in the Land; The Supreme Court	1										1		
	Track Workshops - Registrants Pick One		A	B	C	D	E	F	G	H	I	J	K	L
	Charitable Track - A Study of High Net Worth Philanthropy: What Does It all really Mean?	1									1			
	Compliance Track - The Use of S Corporations in Estate Planning	1	0.5	0.25						0.25				
	Controversies Track - The Planner vs. The Enforcer: Issues which Cause Audits of Estate and Gift Tax Returns	1	0.5							0.5				
	Fiduciary Track - It Isn't over till the Post-Mortem Planning Is Done	1								0.5				0.5
	Financial Track - Managing Highly Appreciated Assets	1	0.5							0.25		0.25		
	Insurance Track - New Rules for Avoiding Traps that Could Make Life Insurance Subject to Income Tax	1								0.5		0.5		
	Tax Track - Section 1202 Qualified Small Business Stock-Recent Developments	1	0.5	0.25						0.25				
	Track Workshops - Registrants Pick One		A	B	C	D	E	F	G	H	I	J	K	L
	Charitable Track - Impact Investing and ESG Integration	1									1			
	Compliance Track - Powerful Trends and Advantages with Changing the Situs of a Trust Utilizing Modern Reformation/Modification, Restatement, and Decanting Strategies	1								0.5		0.5		
	Controversies Track - Powers of Attorney - Myths, Management, and Litigation	1								1				
	Fiduciary Track - Taking Care of Those in Need: All You Wanted To Know about Special Needs Trust Planning	1								0.5		0.5		
	Financial Track - Private Investor Advantage: 18 Strategies for Family Offices and Investors To Become More Effective	1								0.5		0.5		
	Insurance Track - Accelerated Benefit Riders on Life Policies	1								0.5		0.5		
	Tax Track - Qualified Opportunity Zones Tax Benefits and Planning	1	0.5							0.5				

	Track Workshops - Registrants Pick One		A	B	C	D	E	F	G	H	I	J	K	L
	Charitable Track - Crowdfunding for Charity: Federal Tax and State Charitable Solicitation Issues	1									1			
	Compliance Track - Does Your Wealth Transfer Strategy Create a Legacy	1								1				
	Controversies Track - Family Dynamics, Ethical Considerations, and Intergenerational Conflict: Preserving Family Wealth and Harmony	1								0.5				0.5
	Fiduciary Track - Undoing the formerly Outstanding Estate Plan for Income Tax Planning	1								1				
	Financial Track - Basics of Trust Administration Regarding Tangible Personal Property	1								1				
	Insurance Track - Life Insurance for the Non-Resident Alien and/or Foreign National Client	1								0.5			0.5	
	Tax Track - Searching for Basis in Estate Planning	1								0.5		0.5		
11/7/2019	A Washington D.C. Update - Current Income Tax Rules, Changes and Trends under the Trump Tax Cuts and Jobs Act	1	0.5							0.25			0.25	
	Lessons Learned from the Past - Don't Repeat the Same Mistakes of 2010	1								1				
	Planning for the Last Chapter: Elder Law Life Care Planning as a Multifaceted Approach with a Legal/Medical Team	1								0.5		0.5		
	Moving beyond Paper - How Technology (and Blockchain) Will Improve Wealth Transfer Security and Efficiency	1								0.5		0.5		
	Winning the Jackpot - A Conversation with Your Clients They Will Always Remember!	1								1				
	TOTAL	75.50	11.5	1	0	0	4.25	0	0	25.5	6	18.5	6.75	2