59th Annual Hawaii Tax Institute - CA Legal Specialist - TAX Sessions

November 6-10, 2022

Date	Session	Hrs	A	B	C	D	E	F	G	H	I	J	K	L
11/6/2022	Pre-Conference Fiduciary Income and Entity Taxation Workshop	5								2.5		2.5		
	Pre-Conference Fiduciary Estate, Gift and GST Taxation Workshop	5								2.5		2.5		
11/7/2022	Pre-Conference Workshop - The Fundamentals: Common and Practical Planning and Gifting Techniques for All Wealth Transfer Advisors	1.5								0.75		0.75		
	Recent Developments Facing All Wealth Transfer Advisors	1.5								1.5				
	Next-Gen Planning: What Advisors are Discussing with Gen X, Y & Z Clients	1								1				
	Retirement Accounts: Planning Optimal Family and Charitable Outcomes	1	0.5									0.5		
	Luncheon: Tax Court Updates and Understanding the Role of the Tax Court in Our Federal System of Taxation	1					1							
	Current Developments in Charitable Giving and Nonprofits	1									1			
	The Modern Art of Delegation: Delegation of Investment Management Functions by a Trustee in the mid-21st Century	1								0.5		0.5		
	Using the IRS's Taxpayer Advocate Service to Help Taxpayers Across the Country	1	0.25	0.25	0.25	0.25								
11/8/2022	Valuation - How to Read and Critique an Appraiser's Appraisal	1.25	0.25			0.25				0.75				
	Fun and Interesting Strategies to Address Common Income Tax Situations in Estate Planning	1.5	0.75							0.75				
	Cross Border Tax Planning for Clients with Ties to Japan and Other Asian Countries	1											1	
	Luncheon: Federal Funding of the Internal Revenue Service and How the Monies Will Be Spent	1										1		
	Track Workshops - Registrants Pick One		A	B	C	D	E	F	G	H	I	J	K	L
	Compliance Track - Planning for Privacy in a Public World: The Ethics and Mechanics of Protecting Your Client's Privacy and Personal Security	1												1
	Controversies Track - Foreign Trusts and Gifts - Reporting Obligations, Compliance Issues, and Challenging Those Egregious Penalties!	1											1	
	Fiduciary Track - Exploring the Fiduciary's Duty to Invest Trust Assets	1								1				
	Financial Track - Natural Tension Btn Bsn Devel & Trust Admin During Due Diligence & Onboarding Process & Tips on How to Resolve Things	1										1		
	Tax Track - Taxation of Cryptocurrency and Non-Fungible Tokens (NFTs) with Planning Suggestions	1	1											
	Track Workshops - Registrants Pick One		A	B	C	D	E	F	G	H	I	J	K	L
	Compliance Track - No Good Deed Goes Unpunished & Ethical Considerations	1												1
	Controversies Track - IRS Target List - Avoiding Audit: How the Transfer Tax Spaghetti is Made	1	1											
	Fiduciary Track - Tax Considerations of Converting Grantor Trusts to Nongrantor Trusts	1	0.5							0.5				
	Financial Track - The Real Scoop: An Update on Charitable Giving and a Comparison of Private Foundations and Donor Advised Funds	1									1			
	Tax Track - QSBS: Quest for Quantum Exclusions (Queries, Qualms, Qualifications & QOZ)	1								1				
	Track Workshops - Registrants Pick One		A	B	C	D	E	F	G	H	I	J	K	L
	Compliance Track - Starting, Maintaining or Growing a Solo or Small Firm Estate Planning Practice	1									1			
	Controversies Track - Red Flags: Understanding Threats to Your Client's Wealth & Personal Safety & Helpful Hints on How to Protect Against Th	1								1				
	Fiduciary Track - Business, Legacy, and Taxes: Strategies for Efficient Intra-Family Transfers or Third Party Sales of Closely Held Businesses	1		0.5	0.5									
	Financial Track - How Trustees and Wealth Transfer Advisors Can Use Property and Casualty Coverage for Asset Protection	1								1				
	Tax Track - "So, You Want to Give Us Your Picasso?" How to Recognize the Benefits and Pitfalls of Gifts of Art	1	0.5							0.5				
11/9/2022	FBAR Reporting: Trends, Pitfalls, and Enforcement. What you need to discuss with your clients	1.5	0.75							0.75				
	Attacking and Defending Trustees	1									1			
	Forty-Three of the Best Creative Tax Planning Ideas	1.25								1.25				
	Luncheon: The US Financial Markets, Interest Rates, Inflation, Corporate Earnings, Housing Market and More	1								1				
	Track Workshops - Registrants Pick One		A	B	C	D	E	F	G	H	I	J	K	L
	Compliance Track - Old Dog or New Trick? The Evolution of Joint Spousal Trusts in Today's Wealth Transfer Strategies	1								1				
	Controversies Track - Fiduciary Accounting Nightmares and How to Avoid Them	1										1		
	Fiduciary Track - Where Purpose Meets Planning	1								1				
	Financial Track - Premium Financing - Advanced Planning Techniques for the Ultra High Net Worth Client	1	0.5							0.5				
	Tax Track - Drafting and Planning for Trusts to hold IRAs under the SECURE Act	1								1				
	Track Workshops - Registrants Pick One		A	B	C	D	E	F	G	H	I	J	K	L
	Compliance Track - Where There's a Will, There's a (New) Way: a Primer on Electronic Estate Planning and Wealth Transfer Documents	1										1		
	Controversies Track - Correcting Planning Mistakes and Shoring Up Messy Wealth Transfer Structures	1	0.25	0.25								0.5		
	Fiduciary Track - Video Killed the Radio Star & Digital Assets are Killing Paper Trial: A Primer on Digital Assets - How to Plan & Administer Them	1	0.5							0.5				
	Financial Track - 529 Plans: A Compelling Tax and Estate Planning Tool	1	0.5							0.5				
	Tax Track - Sweet Home Alabama: Creative Strategies to Use and Pitfalls to Avoid when Gifting Real Estate to Nonprofits	1				0.5					0.5			
	Track Workshops - Registrants Pick One		A	B	C	D	E	F	G	H	I	J	K	L
	Compliance Track - Tax Efficient Investing for the Various Trusts and Wealth Transfer Strategies Being Credited	1					1							
	Controversies Track - Family Dynamics & Intergenerational Conflict: Preserving Family Wealth and Harmony	1										1		
	Fiduciary Track - First, Say "I'm Sorry" - Exploring the Psychological, Legal &Ethical Impact of Grief in Wealth Transfer Strategies & Structures	1										0.5		0.5
	Financial Track - The Flexible Beneficiary Trust for Qualified Plans and IRAs	1	0.5							0.5				
	Tax Track - Time to Revisit Your Client's Choice of Entity for Tax and Compliance Purposes	1		0.25	0.25	0.5								
11/10/2022	Over-Rated? How Surging Interest Rates and Slow Growth May Radically Change Wealth Transfer Planning	1								0.5		0.5		
	Mission Impossible? Solving the Estate and Income Tax Tradeoff	1	0.5							0.5				
	Designing Irrevocable Trusts to Protect Assets from Being Reached in a Divorce	1								1				
	The Aftermath: Dealing with Promissory Notes During Life and After Death Resulting from Intentionally Defective Grantor Trust Sales	1	0.5							0.5				
	When Aggressive Tax Planning Becomes Criminal Conduct and Ethical Considerations	1					0.5							0.5
	TOTAL	63.50	8.75	1.25	1	1.5	2.5	0	0	25.75	4.5	13.25	2	3