Webinar: Wealth Transfer Planning During the Pandemic: Change and Opportunity

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Our world has undergone a relatively immediate and significant change as a result of the COVID-19 pandemic. Businesses, financial markets, schools, health care systems, tax laws, and our daily lives have changed and been disrupted in response to the pandemic. This program will focus on the wealth transfer planning considerations and opportunities created in this new world, including a discussion of the following:

- Estate Planning Considerations, Including Medical Directives and Living Wills
- Executing Estate Planning Documents While Social Distancing
- Extension of Tax Filing Deadlines
- Charitable Giving Under the CARES Act
- Minimum Required Distributions Under the CARES Act
- Valuation Planning
- Planning with Lower Interest Rates
- Planning Techniques Well Suited to the new environment including GRATs, Sales to Grantor Trusts, Intra-Family Loans, Charitable Lead Trusts, and Roth IRA Conversions

Click here to download the presentation materials.

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