Webinar for Professional Advisors

"Tax Reform - Helping High Net Worth Families" with CPA Robert Keebler

Date:

Wednesday, January 17, 2018

Time:

3:00-4:00 p.m. Eastern
2:00-3:00 p.m. Central
1:00-2:00 p.m. Mountain
Noon-1:00 p.m. Pacific

Presentation topics:

The Tax Cuts and Jobs Act is the most significant tax reform in 30 years. This webinar will explore the critical aspects of the Act and provide specific planning ideas. Topics covered will include:
1. Individual taxation - changes to exemptions, deductions, brackets and credits.
2. Taxation of investors - elimination of the specific identification method in favor of FIFO cost basis tracking.
3. Business taxation - a new lower corporate rate, special pass-through business rate, and a variety of other important changes.
4. Estate taxation - a doubling of the estate tax exemption.

Accountants:

If you have a course monitor at your viewing location and you pre-register to attend, you can earn CPE credit for attending this webinar. To pre-register, click the URL on the next page. Once you register, you will be emailed the appropriate forms to apply for credit. This course qualifies with NASBA for 1.0 hour of CPE credit in the category Taxes.

About the presenter

Robert S. Keebler, CPA/PFS, MST, AEP® (Distinguished) is a partner with Keebler & Associates, LLP and is a recipient of the prestigious Accredited Estate Planners (Distinguished) award from the National Association of Estate Planners & Councils. He has been named by CPA Magazine as one of the *Top 100 Most Influential Practitioners in the United States* and one of the *Top 40 Tax Advisors to Know During a Recession*. His practice includes family wealth transfer and preservation planning, charitable giving, retirement distribution planning, and estate administration. Mr. Keebler frequently represents clients before the National Office of the Internal Revenue Service (IRS) in the private letter ruling process and in estate, gift and income tax examinations and appeals, and he has received more than 250 favorable private letter rulings including several key rulings of "first impression." He is the author of over 100 articles and columns and is the editor, author or co-author of many books and treatises on wealth transfer and taxation. Mr. Keebler has been a speaker at national estate planning and tax seminars for over 20 years including the AICPA's: Estate Planning, High Income, Advanced Financial Planning Conferences, ABA Conferences, NAPEC Conferences, The Notre Dame Estate Planning Conference and the Heckerling Estate Planning Institute and is currently the chair of the 2017 AICPA ENGAGE Conference.

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Upcoming 2018 Advisor Webinar Series

Steven J. Oshins, Esq., AEP® (Distinguished)
Wednesday, April 18, 2018 | 3:00-4:00 pm Eastern

James M. Duggan, MBA, J.D.
Wednesday, July 18, 2018 | 3:00-4:00 pm Eastern

Bryan K. Clontz, CFP®, CLU®, ChFC®, CAP®, AEP®
Wednesday, November 14, 2018 | 3:00-4:00 pm Eastern

Attend the presentation:

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For CPE recipients: These one (1.0) hour advanced-level (group live) courses are offered for the benefit of practicing accountants with significant exposure to the subject and will focus on the development of in-depth knowledge necessary for proper consulting. These programs will provide the participant with an overview of technical topics related to estate planning. No advanced preparation is necessary.

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