

Advanced Planning Topics

ESTATE PLANNING

- Estate Planning Document Reviews
- Irrevocable Trusts
- Spousal Lifetime Access Trusts
- Special Needs Trusts
- Dynasty Trusts
- Intentionally Defective Grantor Trusts
- Strategic Gifts
- Valuation Discounts
- Installment Sales to Grantor Trusts
- Grantor Retained Annuity Trusts
- Intra-Family Loans
- Private Split-Dollar
- Four Ways to Pay Estate Taxes
- Estate Tax Projections
- Imbalanced Estates/Estate Equalization
- Foreign Nationals: Inbound/Outbound
- Premium Financing

LIFE INSURANCE AS AN ASSET CLASS

- Roth IRA Alternatives
- Sequence Risk
- Life Insurance in a Portfolio
- Annuities: Capital Preservation
- Annuities: Income Planning
- Long-Term Care: Self-funding vs. Derisking
- Private Placement Variable Universal Life Insurance
- Private Placement Variable Annuities
- Policy Valuation/Life Settlements

BUSINESS PLANNING

- Buy-Sell Reviews
- Buy-Sell Funding
- Key Person
- Golden Handcuffs
- Golden Parachutes
- Deferred Compensation
- Stay Bonuses
- SERPs
- Non-Qualified Executive Benefits
- Employer Split-Dollar
- Business Entity Selection/Planning
- Life in a Qualified Plan
- §412(e)(3)/Fully Insured Plans
- Disability Income Solutions
- Executive Carve-Out LTC Plans

PHILANTHROPIC PLANNING

- Charitable Remainder Trusts: Retirement Income
- Charitable Lead Trusts: Wealth Transfer
- Private Foundations
- Charitable Planning with Life Insurance