NBI: National Business Institute Online Seminar

Estate Planning for Spouses

Speaker: Scott M. Nelson, attorney at MCM

Thursday, October 13, 2011

Time:	
Eastern	3:00 pm-4:30 pm
Central	2:00 pm-3:30 pm
Mountain	1:00 pm-2:30 pm
Pacific	12:00 pm-1:30 pm

Product ID#: 57935ER

Program Description

Marital Exemption-Based Planning Tips

Marriage grants some of the most iron-clad property rights used in retirement, incapacity and estate planning. The same rules can work against the grantor and the intended beneficiaries in cases of divorce and re-marriage. This course reviews key issues, rules and challenges associated with estate planning for spouses to help you avoid mistakes and common pitfalls. Maximize the spousal exemption opportunities and account for prior marriages and divorces when planning for the estate. Register today!

- Understand what real property exemptions, allowances and planning options exist.
- Review common marital deduction formulas.
- Get a tax law update to prepare your practice for the recent and forecasted changes.
- Walk through a sample case study to find out how the rules are applied in practice.

Who Should Attend

This legal briefing is designed for attorneys. It will also benefit estate and financial planners, trustees, and paralegals.

Course Content

- Homestead, Exempt Property and Allowances
- Effect of Pre- or Post-Nuptial Agreements
- Omitted Spouses
- The Surviving Spouse's Elective Share
- Marital Trusts and Other Tools
- Marital Deduction Formulas
- Tax Consequences
- Case Study: Evaluating Spousal Rights

Continuing Education Credits:

Available. Check website for details...

Register online at: www.nbi-sems.com **Product ID: 57935ER**