

The Robert G. Alexander Webinar Series

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Wednesday, October 16, 2019 at 3:00pm - 4:00pm ET - Elder Law and Special Needs Planning

This intermediate level program will provide an update on elder law and special needs planning, including how to draft a plan that works and takes into account future incapacity of the client and beneficiaries. Use of trusts will be discussed, as well as appropriate trust distribution standards.

Bernard A. Krooks is the founding partner of the New York law firm Littman Krooks LLP and chair of its elder law and special needs department. He is past president of the Arc of Westchester, the largest agency in Westchester County, NY serving people with intellectual and developmental disabilities and their families.

A frequent presenter at the Heckerling Institute on Estate Planning and other national estate planning conferences, Mr. Krooks is immediate-past Chair of the Elder Law Committee of the American College of Trust and Estate Counsel (ACTEC) and Chair of the Elder Law and Special Needs Planning Group of the Real Property, Trust & Estate Law (RPTE) Section of the American Bar Association. He is past president and fellow of the National Academy of Elder Law Attorneys (NAELA), past president and founding member of the New York Chapter of NAELA, past Chair of the Elder Law Section of the New York State Bar Association, and past president of the Special Needs Alliance, a national invitation-only non-profit organization dedicated to assisting individuals with special needs and their families.

Mr. Krooks, author of numerous articles on elder law and related topics, is chair of the Elder Law Committee of Trusts & Estates Magazine, and serves on the Wolters Kluwer Financial and Estate Planning Advisory Board and the Advisory Committee of the Heckerling Institute on Estate Planning.

[REGISTER HERE](#) for the individual program. To register for the 2019 webinar series, please click [HERE](#).

Wednesday, December 11, 2019 at 3:00pm - 4:00pm ET - Longevity

Detailed information regarding this presentation will be posted soon.

[REGISTER HERE](#) for the individual program. To register for the 2019 webinar series, please click [HERE](#).

Wednesday, January 8, 2020 at 3:00pm - 4:00pm ET - Reverse Mortgages

Detailed information regarding this presentation will be posted soon.

Wednesday, January 29, 2020 at 3:00pm - 4:00pm ET - Complimentary Sponsored Webinar: Life Settlement Legal and Ethical Responsibility

Disruption is the new normal for many planning professionals that work with their clients in a fiduciary capacity. It's difficult for any fiduciary to feel comfortable today working with clients on matters that are outside of their area of expertise. This is especially true with life settlements.

Life settlement providers, who represent the institutional investors, have noticed the lack of life settlement discussions and education coming from planning professionals and are filling this void by increasing their direct-to-consumer marketing. Such direct marketing exploits a crack in the chain of fiduciary oversight and places senior clients in a position where they might enter into a contract to sell their life insurance policy without having any advocate at the table to protect their best interests in the life settlement process.

We will discuss multiple disruptive factors that have negatively impacted senior clients and show how we arrived at a point where so many seniors are not represented by a fiduciary when they sell their policy on the secondary market. We will review life settlement regulations, laws, and litigation that protect the rights of policy owners to sell their policies. Our main goal is to alleviate the confusion surrounding life settlements that have caused a majority of fiduciary advisors to avoid discussing life settlements with their clients. We will close with a list of Life Settlement Best Practices for Fiduciaries that will help them protect their client's best interest if their client is planning to lapse or surrender an existing life insurance policy.

Jon B. Mendelsohn, CEO of Ashar Group/Ashar SMV, is an accomplished presenter and frequent speaker at the Annual Conference of the National Association of Estate Planners and Councils (NAEPC), American Institute of Certified Public Accountants (AICPA) annual ENGAGE Conference, the Association for Advanced Life Underwriting (AALU), Advisors in Philanthropy (AIP), and several other conferences and meetings nationally. Ashar Group is an independent resource that supports financial advisors and fiduciaries by providing life insurance appraisals, life settlements, and longevity services.

Registration information will be posted soon.

Wednesday, February 12, 2020 at 3:00pm - 4:00pm ET - Basis Step-Up Strategies in Light of Portability and Tax Law Changes

We will review a variety of basis step-up strategies, including tools to allow couples in common law states to get community property benefits, modifying irrevocable trusts to make them includible in the primary beneficiary's, or selling assets from an irrevocable trust (income-tax free) to the grantor. We will discuss how portability plays into basis step-up planning and how those with small, medium and large estates may benefit.

Steve Gorin is a partner in Thompson Coburn LLP, headquartered in St. Louis, with other offices including Chicago and Los Angeles. He uses his background as a CPA to integrate income tax planning into estate planning for business owners and wealthy individuals. For more on Steve, see <http://thompsoncoburn.com/people/steve-gorin>, and for free resources (including over 2,000 pages on planning for owners of private businesses) see <https://www.thompsoncoburn.com/insights/blogs/business-succession-solutions/about>.

Registration information will be posted soon.

Wednesday, March 11, 2020 at 3:00pm - 4:00pm ET - Charitable Giving and Tax Planning Strategies in the TCJA Era

The tax act formerly known as the Tax Cuts and Jobs Act (TCJA) fundamentally altered the charitable giving and tax planning landscape for all donors. In this program, the presenter will summarize the major tax law provisions that impact charitable giving and donors, and identify and discuss key charitable giving and tax planning opportunities and strategies available to donors today.

Patrick J. Saccogna, JD, LL.M. (taxation), CPA*, AEP®, is a partner in the Personal & Succession Planning practice group of Thompson Hine LLP, in Cleveland, Ohio, and focuses his practice on counseling high net worth individuals, families, and closely-held businesses in a wide range of personal, charitable, business, tax, multi-generational wealth transfer, asset protection, and succession planning matters, and representing fiduciaries and beneficiaries in estate and trust administration, tax compliance, and fiduciary litigation matters. Patrick is a Fellow in the American College of Trust and Estate Counsel (ACTEC), a Certified Public Accountant (CPA) in Ohio, and is an Ohio State Bar Association (OSBA) Board Certified Specialist in Estate Planning, Trust and Probate Law. Patrick is currently serving as the Chair of University Hospitals' Diamond Advisory Group, is a past President of The Estate Planning Council of Cleveland, a past Chair of the Estate Planning, Probate, and Trust Law Section of the Cleveland Metropolitan Bar Association, a past Chair of Case Western Reserve University's Estate Planning Advisory Council, is ranked in *Chambers HNW 2019* (Ohio: Private Wealth Law), and received the Estate Planning Council of Cleveland's 2017 Distinguished Estate Planner Award. [* = inactive CPA status]

Registration information will be posted soon.

Wednesday, April 8, 2020 at 3:00pm - 4:00pm ET - TBD

Detailed information regarding this presentation will be posted soon.

Wednesday, May 13, 2020 at 3:00pm - 4:00pm ET - TBD

Detailed information regarding this presentation will be posted soon.

Wednesday, June 10, 2020 at 3:00pm - 4:00pm ET - Planning Team Revenue Opportunities Generated by New Tax Law

Listen to this program if you are interested in how an insurance professional has used the recent tax legislation to help clients plan by including several members of the planning team. This intermediate level program will include multiple case examples.

Terri Getman is a nationally recognized lecturer, author and advisor to financial representatives who provide advice to families and privately-held business owners across the U.S. For more than 30 years Terri has specialized in the appropriate use of life insurance in client's estate, business and executive benefit plans. Terri currently works for Diversified Brokerage Services, one of the largest life insurance brokerage general agencies, but for most of her career she held positions in advanced marketing at several large insurance carriers.