Thursday Insights for February 2020
2:30 p.m. – 4:00 p.m.

February 6, 2020 – Your Client's Future – A Legal Checkup; *Presented by Yvonne Amrine, Esq.*

With a properly prepared strategy in place, you can help your client maintain control when it comes to protecting what they care about most –family and friends, financial assets, healthcare decisions and charitable causes. Ms. Amrine will review the key legal documents needed to stay in control even when a client loses capacity or needs long term care. She will also review MediCal and VA Programs that can help pay for long-term care while preserving their assets. See how this team approach can help your clients face a difficult diagnosis by planning ahead. What are the levers in a good estate plan that allow for asset protection when faced with the high cost of long term care? How can you maintain assets under management for the client's best outcome?

February 13, 2020 – Tell Your Clients and Friends – What To Do, and What Not To Do, If You Are Pulled Over After You've Had a Cocktail; *Presented by Richard Katzman, Esq.*

Driving is such an important part of our daily living that many people do not realize how much time they spend behind the wheel until their license is suspended or revoked. If someone is arrested for a DUI, they are faced with two DUI proceedings: a DMV procedural hearing and the criminal prosecution. Join Richard as he shares insights on the critical moments from when you see the red and blue lights in your rearview mirror and the possible turmoil that's to follow.

February 20, 2020 – Business Exit Tax Planning for the Deal that is Going Down Now; *Presented by Joe Strazzeri, Esq., CEPA and Alexis Bastedo, Esq.*

Join Joe and Alexis as they review a 2019 case where the founder client had less than a controlling interest with the opportunity of a pending sale, facing a $20 million tax hit. Review the options and twists and turns of the case details, the deal itself, and the final plan.

February 27, 2020 – Pre-empted for The Gathering
Visit www.scinstitute.org/Gathering-2020 to register.

*Please join us for our 16th annual Gathering on **February 27 & 28** for two days of shared insights, education, and collegiality. The Gathering is an annual event for all advisors in Estate, Business, and Wealth Strategies Planning. See enclosed brochure for more information.*