TAX/ESTATE PLANNING/ELDER LAW PRACTICE

Earn up to **6.7** CLE CREDIT(s)

Advanced Special Needs Trust

Presented in cooperation with the NJSBA Senior Lawyers Special Committee

Having a solid understanding and roadmap can be the difference between success and failure. This seminar will provide that roadmap.

When a client comes to you asking for help planning for the financial security and wellbeing of a child with a disability, are you confident that you can handle the situation? This program will provide you with a roadmap to properly plan for the future of the special needs dependent. It will include a look at various estate planning options, drafting tips, tax tips, trust advantages, selection of a trustee, discussion of trustee duties, and litigation issues.

The **new amendments to the Rules of Professional Conduct** were enacted in response to the Report and Recommendations of the Special Committee on Attorney Ethics and Admissions and the Working Group on Ethical Issues Involving Metadata in Electronic Documents, and cover new and emerging technology areas **you now need to have a baseline understanding of like metadata and other related issues.**

Learn the ways to confidently guide your clients in planning for special needs children, including:

- Review of basics; SNT update (overview of recent legislative & case law developments)
- Drafting differences between 3rd party and 1st party SNTs
- Taxation: including estate, gift and income taxes; impact of the UTC on estate/gift taxation
- The use of SNTs in divorce
- Legislative updates: including ABLE Act, Affordable Care Act, SNT Fairness Act, NDAA (Vet pensions to SNTs for disabled children)
- Reformation; SNTs vs. support (settlement preservation) trusts
- SNTs and Section 8 housing
- UTC: including default vs. mandatory rules, discretionary vs. spendthrift provisions, impact on creditor claims
- Ethical issues including conflicts between grantor, establisher, trustee, and beneficiary, and a discussion of the new obligations and duties imposed on lawyers in the recently-amended Rules of Professional Conduct.
- Achieving A Better Life Experience (ABLE) Act - what is an ABLE account, when to use an ABLE account versus a special needs trust, tax advantages of ABLE accounts, account management considerations

NJ CLE INFORMATION: *This program has been approved by the Board on Continuing Legal Education of the Supreme Court of New Jersey for 6.7 hours of total CLE credit.*

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NJICLE Seminar

REGISTRATION DETAILS

Seminar tuition includes breakfast, luncheon and seminar materials. Visit NJICLE.com for directions to all locations.

NEW BRUNSWICK
ICELD031916
Thurs., Dec. 1, 2016
9 a.m. to 4 p.m.
NJ Law Center

LIVE WEBCAST
Online Only
WELD031916

Can't Attend?
MCLE on CD/Handbook
CDP31916: $255/$204*

CREDITS
NJ CLE: This program has been approved for 6.7 credits (50 minute hour)

PA CLE: 5.5 substantive credits pending ($24 fee – separate check payable to NJICLE must be submitted at the end of the program)

NY CLE (Non-transitional): 6.5 professional practice credits

CPE: 6.5 taxation credits

ADVANCE REGISTRATION	FEE	TYPE
General Tuition	$215	REG
Special Discounts for NJSBA Members!		
MEMBERS, NJSBA	$172	NJB*
MEMBERS, NJSBA YLD	$161	YLD*
Paralegals	$139	PAR
Law Students (with Student ID)	Free	STU
Full Time Judges	Free	JUD
DOOR REGISTRATIONS	$235	

*** NJSBA Member Price.**