

Boston Estate Planning Council Education Tracks

Category of Track:

L = Legal

I = Insurance

F = Financial

T = Tax

P = Philanthropy

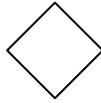
PD = Professional Development

SD = Supporting Disciplines

Level of Track:



= Fundamentals



= Technical



= New Developments

Descriptions of Categories for Tracks

Legal = These programs explore state, national and international legal developments in estate planning, including, but not limited to, drafting techniques, fiduciary and probate litigation, elder law, special needs law, international cross-border planning, and estate or trust administration.

Insurance = These programs include all topics related to insurance policies in the context of estate planning, including, but not limited to, trends in the life insurance industry, the use of funding buy-sell agreements with life insurance, long-term care insurance, and managing “older” life insurance policies.

Financial = These programs educate advisors on how to better plan for their clients’ financial futures. Topics might include retirement planning, stock and equity options, investment trends, healthcare planning, and planning for liquidity events.

Tax = These programs explore a broad array of tax issues in the estate planning context, including, but not limited to, estate, gift, generation skipping and income taxes, tax return preparation considerations for the foregoing taxes, tax issues related to retirement planning and qualified plans, federal tax reform, taxation of international assets, and tax considerations when choosing different estate planning vehicles.

Philanthropy = These programs explore the formation and ongoing administration of nonprofit organizations, nonprofit board leadership, gift planning, donor advised funds and foundations, developments in tax advantageous charitable planning strategies, and considerations when choosing among charitable planning vehicles. These programs may also include new trends in philanthropy outside of the nonprofit sector, such as sustainable investments and impact investing.

Professional Development = These programs include practice development and advisory skills, including prospective client engagement, strategies for retaining clients, etiquette, marketing, and communication skills. Other programs may involve career and leadership development for estate planning professionals, including mentorship within the field of estate planning.

Supporting Disciplines = These programs are led by supporting consultants in fields closely related to estate planning, and include topics such as valuation and appraisals, risk management, business succession planning, addressing family dynamics, and cyber security.

Descriptions of Levels for Tracks

Fundamentals = These programs introduce estate planning professionals to a high level overview of the particular topic described. Fundamentals programs are geared toward professionals who want a basic understanding of a topic outside of their area of expertise.

Technical = These programs delve more deeply into the nuances of the described topic. Technical programs are geared towards professionals who already have a sophisticated understanding of the particular topic and want to explore the topic in greater detail.

New Developments = These programs educate attendees about new developments in the particular topic covered, including timely cases, legislative developments, and/or strategies or advisory practices, as applicable.

Eligibility for Continuing Professional Education Credits for Accountants

Programs designated with an “*” are eligible for Continuing Professional Education (CPE) credits for accountants.