



**16  
HOURS FREE  
CE CREDIT**

# Supercharge Your Practice

with the **Trusts & Estates**

## BOOT CAMP FOR CPAs AND ADVISORS

**Two-day Session:**

**Thursday, May 26, 2011 and Friday, May 27, 2011**

Four Points By Sheraton  
5990 Green Valley Circle  
Culver City, California 90230

**B|lf**

**BursteinLawFirm**

*The Legacy You Create Lives Forever*

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# Supercharge Your Business and Earn 16 Credits!

Dear Colleague:

As I write this on March 25, 2011, internationally a lot has occurred since the beginning of the year. In the estate planning/estate administration area of the law, we have settled into a two year period wherein the exclusion amount has increased to \$5 million per individual and “portability” has been introduced. How do we assist our clients knowing that there could be change as soon as January 2013?

Among the many benefits that the Boot Camp provides is the opportunity to bring business into your practice through the use of valuable estate planning techniques. You will learn skills that will help you help your clients and answer their questions in this important area. Moreover, you will be able to increase your business while helping your clients meet their needs.

The client-centered approach we are taking, as opposed to a results oriented approach, when we discuss ILITs, FLPs, CRTs, GRATs, Sales to an Intentionally Defective Grantor Trust and IRA Trusts, is unique. Hopefully, this will be one of the most valuable events you’ve ever attended – and you will be able to fulfill some of your continuing education requirements for the year.

I’m looking forward to meeting you.

Sincerely,

*Michael Burstein*



**Michael Burstein,**  
Attorney at Law

Michael Burstein’s practice is focused on estate planning, elder law and probate. He earned his JD from the University of California, Hastings College of the Law (the oldest law school west of the Mississippi) in 1987. At Hastings he was the Managing Editor of the *Constitutional Law Quarterly*.

Michael is a member of the California, Kansas and Oklahoma Bars, as well as Beverly Hills Bar Association’s Order of Distinguished Attorneys and on the Board of Directors of the Culver Marina Bar Association. He is also a member of WealthCounsel, a national network of estate planning attorneys, and a founding member of WealthCounsel’s Advisors Forum. Michael gives frequent seminars on estate planning and has educated thousands of people regarding their specific situations. He is extremely committed to the local community, having served as President of the Manhattan Beach Hometown Fair and currently on its Board of Directors, among other duties.

Over the course of his career, Michael has prepared approximately 3,000 trusts, more than 4,000 wills, and probates 50-plus estates per year. His attention to detail, mastery of the law and willingness to do whatever it takes to meet the unique needs of a wide range of clients has allowed him to build a successful practice since 1989. Many of his clients have been with him for years, and recommend his services to family and friends alike.

Learn how you can find additional opportunities to service your clients and put additional revenue in your pocket. This two-day course is designed to take the professional from little to no knowledge of estate planning to practical, real world knowledge. Come away from this event being able to spot the critical estate planning issues facing your clients, along with being able to identify the techniques needed to save taxes, reduce risk, and build increased client satisfaction.

This event will also provide an ideal opportunity to network with other advisors and will provide techniques for working synergistically with these advisors in assisting your clients.

Walk away with estate planning strategies that you can put to immediate use in boosting your practice and helping your clients!

## DAY 1

### Help your client avoid planning pitfalls

- Title to assets
- Beneficiary designations
- Wills
- Understand the probate process

### Find out whether there is a better way for you to assist clients with their estate planning

- Revocable Living Trusts
- Strategies for blended families

### Focus on what your client's really care about

- Minimization of controversy
- Minimization of expenses
- Minimization or elimination of Estate Taxes
- Providing for heirs/beneficiaries

### Understanding the Irrevocable Life Insurance Trust

- What are the benefits?
- Reasons for Life Insurance
- Who can and cannot serve as trustee?
- When is it recommended to have one?

### Learn why CPAs make excellent trustees

- Revocable Trusts
- Irrevocable Trusts including Irrevocable Life Insurance Trusts



## DAY 2

### Learn when a Family Limited Partnership is appropriate and how the CPA should be an integral member

- What is an FLP?
- Non-transfer tax motives for FLP planning
- Asset protection motives for FLP planning
- Valuation adjustment motives for FLP planning

### Get insights on avoiding gains and estate taxes while helping clients pass their entire net worth to their heirs by utilizing charitable trusts

- Advantages of Philanthropic Planning for the client
- How Charitable Remainder Trusts work

### Provide for growth outside of the Estate by utilizing Grantor Retained Annuity Trusts (GRATs)

- What are their benefits?
- When should they be used?
- How do they work? –Their nuts and bolts

### An alternative to GRATs is a Sale to an Intentionally Defective Grantor Trust

- Why they work
- When should they be contemplated?
- Disadvantages

### Integrate Retirement Benefits into a comprehensive estate plan

- Learn distribution rules and related tax consequences
- Who should be the beneficiary?
- Obtaining the stretch
- Should there be an IRA Trust?

### Make estate planning a rewarding part of your practice

- Work with Financial Advisors and Insurance Agents
- Become trustees
- Cementing the bond with your clients



# Thursday, May 26, 2011 And Friday, May 27, 2011

7:30am-8:00am - Registration  
8:00am-12noon - Morning Sessions  
12noon-1:00pm - Lunch on own  
1:00pm-5:00pm - Afternoon Sessions

Four Points By Sheraton  
5990 Green Valley Circle  
Culver City, California 90230

## CREDIT INFORMATION

This conference is designed to be eligible for continuing education credits for a variety of professionals including CPAs/accountants, insurance professionals, and enrolled agents. You will receive a certificate of completion.

## CPAs

This course complies with the California State Accountancy Board's requirements for continuing professional education, and attendees will receive 16 hours of CE credit upon completion of the course.

## LIFE INSURANCE AGENTS

This course is approved by the California Department of Insurance for the granting of 16 hours of Continuing Education Credits upon completion of the course.

## ENROLLED AGENTS

The Burstein Law Firm has entered into an agreement with the Office of the Director of Practice, Internal Revenue Service, to meet the requirements of 31 Code of Federal Regulations, Section 10.6(g), covering maintenance of attendance records, retention of program outlines, qualification of instructors, and length of class hours. This agreement does not constitute an endorsement by the Director of Practice as to the quality of the program or its contribution to the professional competence of the enrolled individual. This course is approved for 14 units of continuing education credit upon completion of the course.

Limited Seating — Register Now to Ensure Enrollment

**Phone: 310-391-1311**

Call today and we will take your enrollment over the phone.

**Fax: 310-391-4853**

Send your registration to our fax 24 hours a day.

We will contact you to confirm receipt.

**Web: [www.bursteinlaw.net/register](http://www.bursteinlaw.net/register)**

Conveniently register online and we will contact you to confirm receipt.

Fill out the registration form and mail it to:  
Burstein Law Firm

Print information for each registrant:

Name: \_\_\_\_\_

Firm: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_

State: \_\_\_\_\_

Zip: \_\_\_\_\_

Bus. Tel: \_\_\_\_\_

Email: \_\_\_\_\_

Years in Practice: \_\_\_\_\_

CE Units for: CPA  EA  Life Ins Agent

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