

225-Page Course Book, Audio CDs, and DVD of  
Live 2.1-Hour January 30, 2014 Presentation  
**STEVEN E. TRYTTEN, Esq.**



# RETIREMENT BENEFITS: SOPHISTICATED ESTATE PLANNING

## Why YOU Should Purchase

In this January 30, 2014, 125-minute program, Steven E. Trytten, Esq., CPA, MBA, gives a useful explanation of the Federal law relating to sophisticated estate planning techniques for retirement benefits. It is geared for lawyers who are already familiar with this topic.

Please note: Mr. Trytten's 125-minute companion course, *Estate Planning For Retirement Benefits: An Introduction*, also presented on January 30, 2014, is intended for attorneys who have had no prior experience in this area and for those who have such experience but would like a basic review of the subject matter.

Mr. Trytten has prepared a comprehensive, 225-page book – and valuable resource – for this course which is included with CD and DVD purchases. The price for this program reflects the extensive content in the written materials, and is not based solely upon CLE credits earned by listening to or viewing the lecture.

This detailed “how-to” practitioner-oriented program gives you the *knowledge you need* to properly advise your clients.

**STEVEN E. TRYTTEN** is a nationally recognized authority on tax and estate planning, quoted in financial publications such as the *Wall Street Journal*, *Forbes Magazine* and *Bloomberg Magazine* and lectures to tax and estate planning professionals across the country. Mr. Trytten, who received his MBA and JD degrees from the University of Illinois, is a Fellow of ACTEC, a member of the Editorial Advisory Board for *Trusts & Estates*, *The Journal of Wealth Management* (Retirement Benefits Section) and, in his spare time, an accomplished musician.

## TOPICS

- ✓ Separate Share Rule; See-Through Trusts
- ✓ Conduit Trusts; Other Approaches
- ✓ Non-Conduit Trusts Providing Outright Gift To “Second Tier” Beneficiaries
- ✓ Non-Conduit Trusts Providing Age Restrictions
- ✓ Dynasty Trusts As See-Through Trusts
- ✓ IRD Deductions
- ✓ Medicare Surtax
- ✓ Investment Limitations
- ✓ The “Trusteed” IRA
- ✓ Post-Mortem Planning And DB (Death Beneficiary) Designations
- ✓ Basic DB Designations
- ✓ Tax Clauses
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- Case Study: Best Way to Pay Death Tax
- Case Study: Short of Funds to Pay Death Tax
- DB Designations & Post-Mortem Planning Under the New Rules
- "Basic" DB Designation - Children as DBs
- See-Through Trusts Under MRD Rules
- The Conduit Trust
- Conduit Trust That Is "Grantor Trust" Under IRC Section 678
- Variations on Conduit Trusts
- Non-Conduit Trust Providing Outright Gift to "Second Tier" Beneficiaries
- Non-Conduit Trust Providing Age Restriction
- Dynasty Trusts
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(438)

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