Top 25 Best Planning Ideas

*May 13, 2014 (2 hours)*

1. Bracket Management – 15 min
2. Harvesting Capital Gain(s) – 5 min
3. Harvesting Capital Loss(es) – 5 min
4. Trusts as S Corporation Shareholders – 3 min
5. Substantial Sale Charitable Remainder Trust(s) – 8 min
6. Retirement Charitable Remainder Trust(s) – 5 min
7. Roth IRA Conversions – 10 min
8. Oil and Gas Investments – 3 min
9. Two-Year Installment Sales – 3 min
10. Nonqualified Tax Deferred Annuities – 3 min
11. Borrowing from Life Insurance Policies – 3 min
12. Income Shifting Charitable Remainder Trust(s) – 5 min
13. Family Limited Partnership(s) – 3min
14. Tax-Aware Investing – 15 min
15. Nevada Incomplete Gift, Non-Grantor Trust(s) – 3 min
16. Captive Life Insurance Company – 3 min
17. Non-Grantor Charitable Lead Annuity Trust(s) – 3 min
18. Grouping Business Activities to Create Material Participation – 3 min
19. Choice of Filing Status – 3 min
20. Intra-Family Loan(s) – 3 min
21. Grantor Retained Annuity Trust(s) – 3 min
22. Dynasty Trust(s) – 3 min
23. Intentionally Defective Grantor Trust(s) Sale(s) – 3 min
24. Domestic Asset Protection Trust(s) – 3 min
25. Spousal Limited Access Trust(s) – 3 min