

## Beth Kaufman to Discuss GST Tax at Heckerling Conference

01.12.2012

Program: GST Tax: Pitfalls, Pratfalls and Practical Pointers

Event Sponsor: Heckerling Institute on Estate Planning

The Heckerling Institute on Estate Planning is the nation's leading conference for estate planners, including attorneys, trust officers, accountants, insurance advisors, and wealth management professionals. The general session lectures and breakout sessions offer comprehensive coverage of the latest estate planning techniques and strategies, while special program tracks allow attendees to customize their educational experience and focus on those areas most relevant to their practice. The event will take place in Orlando World Center Marriott Resort and Convention Center.

**Panel I: Gift Tax Audits: A Tale of Two Initiatives**

**Overview of Panel:** The IRS is obtaining records from third parties and looking for unreported gifts. Current audit initiatives involve intra-family transfers of real property and transfers to 501(c)(4) organizations. Learn who is at risk, what the potential penalties are, and what strategies can be used in these cases.

**Date:** January 11, 2012

**Time:** 9:50 am – 10:40 am

**Panel II: GST Tax: Pitfalls, Pratfalls and Practical Pointers**

**Overview of Panel:** This interactive workshop will review common factual scenarios to highlight recurring GST tax problems in drafting, post-death administration and allocations, and options to mitigate the adverse consequences or take advantage of planning opportunities.

**Date:** January 12, 2012

**Time:** 2:00 pm – 3:30 pm

For more information, visit <http://www.law.miami.edu/heckerling/>.

### Related Practices/Industries

Private Client