

Agenda

Understanding the Grantor’s Goals and Potential Risks Long-term and short-term financial goals Identifying beneficiaries Identifying assets and potential risks Objectives for asset management and control Creation, duration, and termination of trust	<i>F. Ouzts</i>
Creating Revocable “Living” Trusts Purposes of the revocable trust Benefits and drawbacks Funding the trust Administrative issues	<i>C. Saunders</i>
Introduction to Irrevocable Trusts Purposes of an irrevocable trust Benefits and drawbacks Administrative issues Common forms every practitioner should know	<i>H. Bowden</i>
Modifying Irrevocable Trusts under Georgia Law Judicial Modifications Nonjudicial Settlement Agreements Decantings Virtual Representation	<i>T. Turner C. Boyd</i>
Overview of Income, Estate and Gift Tax Consequences of Trusts Income taxation of trusts and beneficiaries Estate tax planning to efficiently transfer wealth while minimizing tax exposure Gift tax planning and consequences of trust transfers	<i>T. Brooks</i>
Asset Protection Planning for Seniors and the Disabled Overview of government benefit programs Trust options Planning for spouses, supplemental needs trusts	<i>R. Lacey</i>



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All About Trusts in Georgia

Live, Interactive Webinar - Tuesday, September 17, 2024

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Learning Objectives

- You’ll be able to:**
- Identify** your clients’ short-term and long-term financial goals.
 - Discuss** clients’ objectives for asset management and control.
 - Understand** the benefits and drawbacks of revocable and irrevocable living trusts.
 - Learn** about the creation, duration and termination of trusts.
 - Use** trusts and other estate planning techniques for asset protection planning for seniors and clients with disabilities.



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All About Trusts in Georgia

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- Understand** the grantor’s short-term and long-term financial goals
- Identify** objectives for management and control of assets
- Create** revocable and irrevocable “living” trusts
- Explore** tax consequences of trusts
- Use** trusts and other estate planning techniques for asset protection planning

Continuing Education Credits

- Attorneys**
7.0 CLE Hours
- Accountants**
8.4 CPE Credits



Webinar Information

Online - Tuesday, September 17, 2024

Log into Webinar: 8:00 - 8:30 am EDT

First Session: 8:30 - 11:00 am EDT

Break: 11:00 - 11:30 am EDT

Second Session: 11:30 am - 1:00 pm EDT

Break: 1:00 - 1:30 pm EDT

Third Session: 1:30 - 4:30 pm EDT

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Faculty

Forbes Ouzts *Coleman Talley*

Mr. Ouzts is an associate in the firm's Jacksonville office. His Practice concentrates on estate planning, trust and estate administration, gift and estate taxation, probate, and representation of tax-exempt organizations. He brings a well-rounded background to these areas, drawing from his legal education and practical experience. Passionate about taxation, Mr. Ouzts obtained his LL.M. degree in Taxation from the University of Florida Levin College of Law. He earned his J.D. degree at Mercer University's Walter F. George School of Law, graduating *cum laude*. During law school, he was an active member of the Phi Delta Phi Honor Society, the Business, Bankruptcy & Tax Law Society, and the Mercer Low Income Tax Clinic.

Cameron Saunders *Page, Scrantom, Sprouse, Tucker & Ford, P.C.*

Mr. Saunders is licensed in Alabama and Georgia to practice law, and focuses his practice in estate and trust planning and administration, probate matters, and nonprofit/tax exempt organizations. He assists individuals and families in preserving and transferring wealth to their loved ones and charitable organizations by crafting and implementing a variety of estate planning techniques, including the routine preparation of wills, powers of attorney, advance health care directives, and revocable and irrevocable trusts. He also assists individual and corporate administrators, executors, and trustees with estate, probate, and trust administrations.

Henry L. Bowden III *The Bowden Law Firm, LLC*

Mr. Bowden is an Atlanta native, who attended high school at The Rectory School in Pomfret, Connecticut, before graduating from The Westminster Schools in Atlanta, Georgia. He then attended Emory University and graduated with a bachelor of arts degree in History. After college, Mr. Bowden worked for an internationally recognized law firm in Atlanta before enrolling at the Emory University School of Law, from which he earned his juris doctor degree in 2012. During law school, Mr. Bowden worked for the Honorable Michael Johnson in the Superior Court of Fulton County and the Honorable Julie Carnes in the United States District Court for the Northern District of Georgia. After law school, Mr. Bowden briefly interned with the Honorable Robert Flournoy, III in the Superior Court of Cobb County.

J. Thompson Turner, Jr. *Djuric Spratt*

Mr. Turner has practiced as an estate planning attorney for over a decade with a particular focus on complex estate and wealth transfer planning, wealth preservation planning, and estate and trust administration. His diverse experience includes advising clients on a range of issues, including business succession planning, charitable planning, educating next generation family members, and family office planning. As a fifth-generation family owner of a Georgia company with diverse asset composition, Mr. Turner understands the complexities and nuances of the intra-family issues that arise in the family business context from both a personal and professional standpoint. This unique perspective on multi-generational estate and family business planning enables him to provide practical and customized solutions that address his clients unique needs and goals.



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Christa R. Boyd *Djuric Spratt*

Ms. Boyd's practice focuses on estate planning, transfer tax planning, and charitable giving. In particular, she advises clients regarding sophisticated wealth transfer strategies, business succession planning, and the formation and taxation of private foundations and other charities. Ms. Boyd was a member of the inaugural 2022-2023 class of the Southeast Fellows Institute of The American College of Trust and Estate Counsel and a member of the 2022-2023 class of the Philanthropic Advisor Leadership Institute. She has previously served as the Secretary of the State Bar of Georgia Fiduciary Law Section Code Revision Committee and currently sits on the boards of two Atlanta charities.

Trace Brooks *Trace Brooks Law LLC*

Mr. Brooks is the Managing Attorney of Trace Brooks Law LLC, an Atlanta-based estate planning and probate firm serving clients throughout Georgia. Mr. Brooks is also an adjunct professor of Law at Georgia State University College of Law, his alma mater, and holds an LL.M. degree from the University of Florida Graduate Tax Program. Mr. Brooks is an active member of STEP, the Estate Planning and Elder Law Sections of the Atlanta Bar Association, and various other professional organizations.

Ruthann P. Lacey *Trace Brooks Law LLC*

Ms. Lacey is of counsel at Trace Brooks Law LLC. A nationally recognized expert in elder law and special needs planning, Ms. Lacey has over 30 years of experience in matters involving estate planning, probate, elder law, and planning for disability. Ms. Lacey is one of a handful of certified elder law attorneys in Georgia and has been a member of the Special Needs Alliance for over two decades.

For more information on the presenters:
Please visit **www.halfmoonseminars.org** or scan the QR code

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