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An In-Depth Look at Trusts: Answers to Your Most Commonly Asked Questions

★★★★★ (82 Ratings)

Produced on: February 26, 2018

Course Format On Demand 🎧 Audio

Taught by Daniel Timins

Categories: Wills, Trusts, & Estates

COURSE DESCRIPTION

TIME 64 MINUTES

DIFFICULTY INTERMEDIATE

Trusts are now the primary way to manage the complexities of government benefits, creditor issues, taxes, and beneficiary protections. Trusts allow us to preserve family assets, and do so without court oversight. But what kind of trusts are appropriate in which circumstances? How do we properly title trust accounts and beneficiaries designation forms? And how do we maximize tax deferral, creditor protection and Medicaid-using trusts?

This program, presented by estate planning attorney Daniel Timins, will answer all these questions and more. Additional topics to be discussed include testamentary trusts, ILITs, Medicaid trusts, asset protection trusts, and other wealth-protection mechanisms.

Learning Objectives:

- I. Identify the different types of trusts, and under what circumstances each is appropriate
- II. Address the challenges you most commonly encounter, such as how to properly title trusts accounts and maximize tax deferral
- III. Gain an overview of special kinds of trusts, such as testamentary trusts, ILITs, Medicaid trusts, and asset protection trusts
- IV. Familiarize yourself with other wealth-protection mechanisms

FACULTY



Daniel Timins

The Law Offices of Daniel Timins

Daniel Timins is an Attorney of Law and a Certified Financial Planner. After graduating from Washington University, he worked at Merrill Lynch, American Express Financial Advisors and Alliance Bernstein Investments. Dan received his Juris Doctorate from Pace Law School in White Plains, New York. He also worked as a legal intern at the Law Offices of Eugenia Vecchio and Associates and the Pace Investors' Rights Project. Dan specializes in Estate Planning, Probate and Medicaid Planning.

Dan helped draft proposed New York legislation for Insurable Interests of Life Insurance Trusts, New York Insurance Law Section 3205, and participated in submitting proposed legislation for the Revocatory Effects of Divorce, EPTL 5-1.4. He has taught continuing legal education classes for the New York State Bar Association, the Westchester County Bar Association, the Brooklyn Bar Association, the Westchester Women's Bar Association, Pace Law School and Fordham Law School, and has been a contributing author to several books, national periodical, editorials, and educational programs.

Dan was named as a New York Super Lawyer Rising Star for 2015, 2016 and 2017, and was a recipient of the "40 Under 40 Rising Stars Award" by the Business Council of Westchester in 2009. He continues to provide pro bono services courtesy of the National Multiple Sclerosis Society and the American Cancer Society, and was the creator of the Wills Drafting Project for victims of domestic violence receiving help from New York City's Family Justice Center in conjunction with the Financial Planning Association of New York City.

Dan is a former Board Member of the Westchester County Bar Association, a former member of the Trusts, Estates and Surrogate's Court Section of the New York City Bar Association, and a former member of Trusts and Estates and Elder Law sections for numerous bar associations.

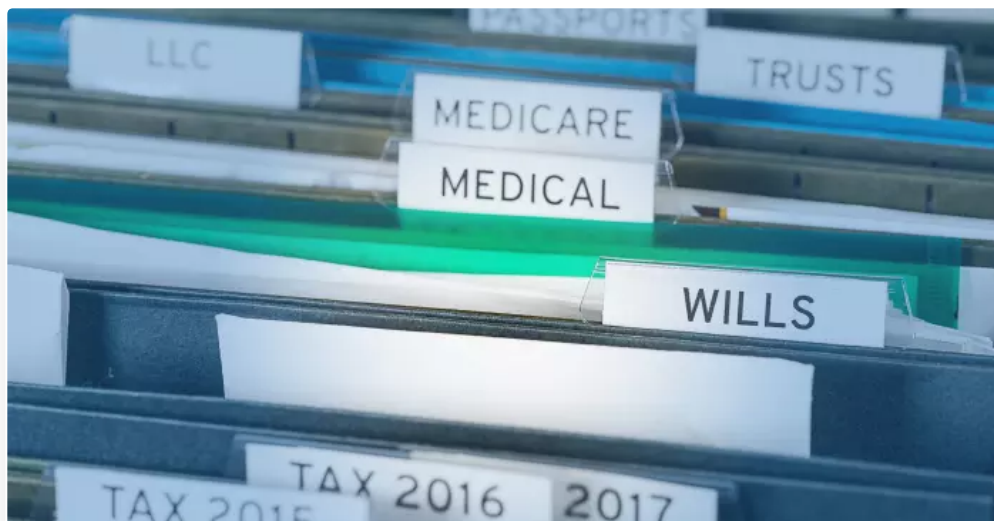
Mr. Timins is licensed to practice law in the state of New York.

REVIEWS

ES Erika S. Good detailed overview

MF michael f. enjoy this class. very informative. and as he said several times this is a huge area of the law. some of his comedy was good.

JF John K. F. Perhaps the best online CLE course I've taken in my career (20+ years).



\$59

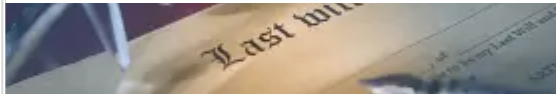
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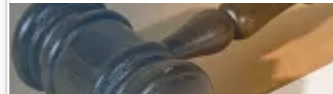
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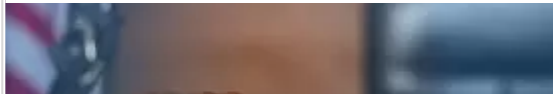
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