WealthCounsel, LLC

Beyond the Basics…
Creditor Protection Above Ground & Below Ground

Presented by Cecil Smith, J.D. and Carol Gonnella, J.D.

COURSE SCHEDULE

Day One

8:30 Introductions and Overview of Workshop

9:00 Communicate More Effectively with Your Clients using Cecil and Carol's Signature PlanningWheel, Graphics, Symbols, Icons and Flowcharts to enable you to communicate more effectively with your clients.

10:00 Networking Break

10:30 **Add Asset Protection to Thicken up those Walls.** Adding Asset Protection to all of your Clients' Testamentary Trusts: "*Below Ground*" Asset Protection Planning. Learn how to motivate clients to be willing to pay you more to have their testamentary trusts creditor protected.

12:00 Lunch

1:30 The Five-Tiers of "*Above Ground*" Asset Protection Planning

3:00 Networking Break

3:30 Protecting the beneficiaries of IRAs and Qualified Plans from Lawsuits and Creditors

5:00 Conclusion of Day One

Beyond the Basics…
Creditor Protection Above Ground & Below Ground

Day Two

8:30 Review of Day One

9:00 Planning with FLPs & LLCs

10:00 Networking Break

10:30 Domestic Asset Protection Trusts (DAPTs)

Case Studies using LLCs and/or DAPTs for Creditor Protection

12:00 Lunch

1:30 Comparing Jurisdictions for Asset Protection Planning.

3:00 Networking Break

3:30 Off-Shore Asset Protection Planning

Case Studies utilizing ALL of the Asset Protection Strategies taught in this seminar. Marketing tips to increase the bottom-line of your law practice by adding Asset Protection Planning as a profit center.

5:00 Conclusion of Day Two