The Intersection of Divorce & Estate Planning: The Top Tax/Planning Tips & Traps You Need to Know

Central Arizona Estate Planning Council

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Whether advising clients before, during or after marriage, professional advisors should be aware of important tools, techniques and other considerations in order to advantageously position their clients in the event of divorce. With the increasing overlap among professional disciplines, advisors have much to gain from having cross-disciplinary fluency.

Topics include:

- Powerful new tax considerations;
- A hidden asset in prenuptial planning that could be worth millions;
- Asset protection trusts: A potentially powerful premarital option;
- Documents that require immediate review in light of divorce;
- Attacking and defending trust assets in divorce;
    - What provisions you may wish to include in trust agreements to help wall off trust assets from claims of potential future ex-spouses
    - What trust administration is potentially viewed as creating a marital interest
    - Compelling options to potentially change otherwise irrevocable trust terms
    - Ways to ameliorate surprising tax consequences that might otherwise distort results
- Key considerations regarding the use of life insurance; and
- Recent developments regarding stored genetic material.

Drawing upon the latest judicial and legislative developments, this presentation will raise awareness of some of the estate planning, tax, and family law issues that need to be considered to better position professionals to advise clients before marriage, during their marriage, and before a divorce is finalized.

Monday, December 2, 2024

Gainey Ranch Golf Club
7600 E Gainey Club Dr,
Scottsdale, AZ 85258

5 - 7:30 pm

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