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Asset Protection: An Overview of Offshore Asset Protection Planning Strategies and U.S. Tax Compliance

Course Outline

Duration:	1 hour
Class size:	No limit
Handout materials:	12-page outline
Who should attend:	Attorneys or CPAs with clients who would benefit from understanding the process by which asset protection can be achieved through the intelligent use of offshore asset protection strategies, including offshore asset protection trusts.

Course Summary:

Asset Protection Planning is an often under-used—but critically important—component of estate planning for the higher-net-worth client. The goal of asset protection planning is to hold title in a solution that legally places assets beyond the reach of a future unforeseen creditor, while allowing the client to enjoy the benefits of the assets should there be a subsequent legal claim brought against him or her. In this presentation, attendees will learn:

- The pros and cons of forming trusts offshore vs. domestically
- Limitations of domestic asset protection trusts
- Protective aspects of offshore trusts
- Factors in selecting an offshore jurisdiction ("situs" selection)
- Typical client concerns and how to address them
- Options for structuring the offshore asset protection trust
- U.S. income tax filing requirements
- Strategies for protecting liquid assets
- Strategies for protecting real estate and other fixed assets
- A review of Offshore insurance structures

For more information, please contact:
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