Snohomish County Estate Planning Council
Topic Survey

Updated September, 2009

In order to assist us with planning next year's programs, we encourage you to add a check mark beside each of the topics below that would be of interest to you on a future program schedule for the Snohomish County Estate Planning Council.

- ☐ What Estate Planners Need to Understand about Family Law Issues
- ☐ TEDRA Fundamentals for Contested Trusts/Estates: Litigation, Arbitration & Mediation
- ☐ Planning Around 409A Rules with Deferred Compensation Arrangements
- ☐ Charitable Planning Considerations
- ☐ IRD Payments used for Charitable Bequests
- ☐ Life Insurance & the Closely Held Business – Developing an Estate Planning Strategy
- ☐ Cash Flow & Control – Installment Sales, Private Annuities and SCINs
- ☐ Business Succession Planning
- ☐ Income Taxation of Trusts & Estates
- ☐ The Ins and Outs of Special Needs Trusts
- ☐ Estate Planning for Non-US Persons
- ☐ Update on the Washington State Estate Tax
- ☐ The Ins and Outs of Nursing Home Care Insurance
- ☐ Medicaid Planning For the Elderly and Disabled – What You Should Know
- ☐ Reverse Mortgages
- ☐ Crummy Trusts
- ☐ What You Should Know About QPRTs & Drafting Tips
- ☐ Gift & Estate Planning in Anticipation of Estate Tax Repeal
- ☐ Handling Partnerships in Your Estate & Trust Administration
- ☐ The Use of Beneficiary Controlled Trusts to Protect a Child's Inheritance from Divorce, Lawsuits and Erosion by Probate & Death Taxes
- ☐ Handling Estates with a Value of $5 Million or Less
- ☐ Practical Planning for Family LLCs and LPs
- ☐ Planning with Retirement Benefits
- ☐ Cohabitation Agreements
- ☐ Marital Deduction Planning – Tax and Non-Tax Considerations of Disclaimer Trust Planning: How the Disclaimer Trust Plan Differs From a Traditional Credit Shelter Trust: Advantages & Disadvantages