

Unlock the Power of Delaware Trusts for Your Entry-Level Employees!

25 Sessions Available on YouTube Videos... Individually or In Topical Bundles...

Only \$199 ea.

(\$299 for non-members)

...or Save with Bundle Pricing!

Contact Renee Duncan for Ordering Information

302-678-8600 renee.duncan@debankers.com

Trust Planning Basics - Only \$800

- Estate/Wealth Transfer Planning Techniques Why the Grantor Created the Trust
- Reading and Interpreting a Trust Document
- Key Factors of a Trust Document
- Foundations in International Trusts
- Investment Basics

Trust Administration - Only \$800

- How to Communicate with Trust Beneficiaries The When, Why and How of It All
- Division of Labor in Trust Administration
- Quarterbacking the Trust Relationship
- Discretionary Decision Making
- How to Properly Administer Directed Trusts
- Trust Termination Best Practices

Tax Planning - Only \$800

- Estate Planning Strategies to Minimize Taxes and Control Wealth Transfer
- Income and Gift Tax Planning
- Basic Income, Estate, Gift and GST Tax
- Recognizing Grantor Trust Issue
- GST Tax Best Practices
- Advanced GST Tax Practices

The Delaware Advantage - Only \$325

- Marketing Delaware: An Overview of Delaware and its Competition
- Silent Trusts

BSA/AML & On-Boarding - Only \$500

- BSA/AML for Trusts
- Bank Secrecy Act and PATRIOT Act Best Practices
- Due Diligence in the On-Boarding of New Accounts

Transferring Trust Situs - Only \$500

- Transferring Trust Situs Techniques and Practical Considerations
- Transfer Trust Best Practices
- Trust Modification



Visit: debankers.com/Foundations-DE-Trusts for full session descriptions (non-members inquire for bundle pricing)