

# Generation-Skipping Tax Considerations

## *Planning and drafting techniques*

The GST tax is one of the three federal transfer taxes that are the cornerstones of estate planning. While a command of its primary functions, the how's, the why's, and the when's, is essential for any estate planning practitioner, GST can be elusive, and known to be the bane of many a practitioner's existence; you either love it or you don't.

This new program focuses on the fundamentals of the tax itself, how to draft when GST planning is, or may be, a primary focus, and how not to draft, all while highlighting tips, tricks, and traps for the unwary and exploring planning techniques to achieve the best GST planning results for your clients.

## Agenda

- Fundamentals, Basic Rules and Definitions
- Drafting Tips, Tricks, and Traps
- Planning Concepts and Techniques
- "Ask the Experts" Q&A Session

## Faculty

Kelly A. Aylward, Esq., *Goulston & Storrs, PC, Boston*, Chair

John H. Ramsey, Esq., *Goulston & Storrs, PC, Boston*

Katherine M. Sheehan, J.D., AEP, *Managing Director, Wealth Strategist, Crestwood Advisors, Boston*

## Dates & Location

Register at [www.mcle.org](http://www.mcle.org)

### LIVE WEBCAST

Friday, November 8, 2024

12:00 pm–2:00 pm

Program # 2250072WBC

### REBROADCAST

Monday, November 25, 2024

2:00 pm–4:00 pm

Program # 2250072RB1

### REBROADCAST

Tuesday, December 3, 2024

9:00 am–11:00 am

Program # 2250072RB2

### ON DEMAND WEBCAST

View after Tuesday, December 3, 2024

Program # 2250072WBA

## Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email [scholarships@mcle.org](mailto:scholarships@mcle.org).

## Materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

## CLE Credits

Earn up to 2 CLE credits



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