



Sample Proposal Submission

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Session Title: Estate Planning Strategies for Complex Family Dynamics

Session Description: This session will explore comprehensive estate planning strategies for high-net-worth clients with complex family situations, including blended families, special needs beneficiaries, and multigenerational wealth transfer concerns. Participants will have the opportunity to examine technical approaches to minimizing estate tax exposure, protecting assets across generations, and structuring transfers that reflect clients' values while maintaining family harmony.

Sharing detailed case studies and real-world scenarios, attendees will have the opportunity to analyze the intersection of technical estate planning tools—including advanced trust structures, family limited partnerships, and charitable giving vehicles—with the behavioral and communication challenges that arise in complex family dynamics. We will address strategic considerations for lifetime gifting, generation-skipping transfer tax planning, and coordination with business succession planning.

This engaging session will provide actionable frameworks for navigating difficult conversations about wealth transfer, identifying appropriate planning structures for various family situations, and implementing strategies that balance tax efficiency with family relationship preservation. Attendees will leave equipped to handle sophisticated estate planning scenarios with greater confidence and technical proficiency.

Learning Objectives:

After attendees leave this session, they will be able to:

1. **Analyze** complex family dynamics and evaluate which advanced estate planning structures are most appropriate for specific client situations.
2. **Develop** comprehensive multigenerational wealth transfer strategies that integrate generation-skipping transfer tax planning, and charitable giving while addressing family conflicts and client legacy goals.
3. **Evaluate** the tax efficiency and practical implications of various advanced estate planning techniques and recommend optimal solutions that balance technical requirements with client values and family relationships.