



Virtual MCLE Event  
Tuesday, February 7, 2023  
12:00pm – 1:00pm

## **ASSET PROTECTION PLANNING**

1 hour participatory MCLE credit  
No-cost, free event

### **Program Description**

From the underlying substantive law to practical aspects of asset protection, you will learn how to keep your assets from plaintiffs, creditors or an agency of the federal government. We'll review planning strategies and solutions, including planning with community property, use of domestic and offshore business entities, domestic and foreign trusts, equity strips, private retirement plans and many other. We will look at how to protect assets in a troubled economy from lenders and landlords holding personal guarantees and how to plan after a lawsuit, a default or an accident. The discussion will focus on the various ways to protect common assets, such as houses, bank and brokerage accounts, businesses and professional practices and retirement plans.

### **About the Speaker**

Jacob Stein, Esq. is the managing partner of Aliant, LLP. He specializes in international tax planning, creative business and private wealth transactions, and asset protection. Jacob received his law degree from the University of Southern California, and a Master of Laws in Taxation from Georgetown University. He is ranked in the Chambers and Partners High Net Worth Guide, holds an AV-rating from Martindale-Hubbell®, has been named a Super Lawyer® by the Los Angeles Magazine for over ten years, and is listed in the top 1% of 'America's Most Honored Professionals' by the American Registry. Jacob was an adjunct professor of taxation at the CSU, Northridge Graduate Tax Program for ten years. He lectures frequently to attorneys, CPAs and other professional groups, teaching over 50 seminars per year for state and local bar associations, estate planning councils, and international networking organizations. Jacob is an instructor with the California CPA Education Foundation, Thomson Reuters, the Rossdale Group, Spidell Publishing, and many more.

Advance registration required: [register via Eventbrite](#) by noon the day of the program to receive a link.