

La Jolla Bar Association – October 11, 2018

TOPIC

Judgment Proof: The State of the Art in Asset Protection

From the underlying substantive law to practical aspects of making your client judgment-proof (i.e., what works and what does not), this program will provide an overview on protecting your clients' assets from plaintiffs and creditors.

We will focus on the strategies and solutions used to protect common assets such as houses, bank and brokerage accounts, businesses, professional practices and retirement plans. The instructor will share real-life stories and anecdotes and will present a very practical approach to protecting assets.

The program will cover:

Overview of Asset Protection including:

- Practical Goals and Limitations
- Picking the Right Structure

Fraudulent Transfers including:

- Effectively Planning for Possible Challenges
- Practical Implications for Planning

Business Entities including:

- Best Practices on Picking the Right Jurisdiction
- Single Member LLCs, Poison Pills and Other Sexy Clauses

Trusts in Asset Protection

- Spendthrift Trusts
- Foreign Trusts

Protecting Specific Assets like:

- Residences
- Retirement Plans
- Rental real estate
- Businesses

SPEAKER BIO

Jacob Stein, Esq. is the managing partner of Aliant, LLP, and is one of the country's best-known asset protection lawyers. Over the past 20 years Jacob has completed over 3,000 asset protection transactions and is the author of numerous articles and several books. Jacob is also a frequent speaker, teaching over 50 legal seminars a year.