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Asset Preservation to offer free CE webinars in September for 1031 advisors, attorneys, CPAs and RE professionals

August 25, 2020 - Front Section

Pamela Michaels

New York, NY Asset Preservation, Inc. will be offering a series of free webinars that qualify for CE credits in September. Pamela Michaels, Esq., senior VP of Asset Preservation, Inc. will lead the presentations, which are open to the public. Topics this month include ethics, parking arrangements, 1031 stratgies, and entity issues. The CE webinars are geared for attorneys, CPAs and all real estate professionals.

Topic: Special 1031 Topics Plus Ethics
Date: September 2, 2020
Time: 12 PM- 2 PM EST

Presented by Michaels and Bradley Borden, Esq.
Cost: Free
2 NY CLE (1 Ethics) Available*
Part 1 by Michaels: Closing a 1031 transaction summarized, closing pitfalls, seller financing and partial exchanges explained. Related party transactions defined along with how to avoid disqualification. Split treatment transactions, special types of real property held for investment summarized, and taxowner issues reviewed.
Part 2 by Borden: Ethics issues that general practitioners and real estate attorneys face when representing 1031 clients. Coverage will include the scope of engagement, conflicts of interest in referring and working with qualified intermediaries, conflicts issues related to representing parties to entity divisions and 1031 exchanges, and obtaining competency to handle the 1031 portions of exchanges.
To register or for more information, CLICK HERE

Topic: Parking Arrangements: Reverse and Improvement Exchanges
Date: September 9, 2020
Time: 12 PM - 1 PM EST
Presented by Michaels
1 NY CLE Available*
Cost: Free
Learn how to take advantage of new opportunities in the investment market to purchase replacement property in a 1031 exchange via a reverse exchange. Safe harbor parking arrangements explained. Reverse exchange options, structures, steps and pitfalls summarized. The specifics of the exchange equation in a reverse exchange. Parking arrangement documentation reviewed. The benefits and requirements of improvement exchanges described. How to obtain 360 days to exchange and other reverse exchange strategies explained.
To register or for more information, CLICK HERE

Topic 1031 Strategies in 2020 (accent on Net Leases)
Date: September 16, 2020
Time: 12 PM - 2 PM
Presented by Michaels and David Thurston of The Thurston Group
2 NY/NJ CLE CPE and CE*
Cost: Free
Learn how to maximize the benefits of §1031 exchanges in 2020 and structure beneficial §1031 exchanges. Understand the essential requirements to qualifying and performing a successful exchange and the role of your Qualified Intermediary. Avoid the most common §1031 pitfalls, understand the related party rules, the impact of seller financing and partial exchanges, split treatment transactions and special tools for partnerships. Learn about the options provided by reverse and improvement exchanges. A feature presentation on net leases will be presented by Thurston.
To register or for more information, CLICK HERE

Topic: Delaware Statutory Trusts: 1031 Replacement Property Strategies

Date: September 23, 2020
Time: 12 PM - 1 PM EST
Co-Presenter: Eric Bicknese, financial advisor at Nationwide Planning Associates, Inc. **
1 NY CLE Available*
Cost: Free
Delaware Statutory Trusts detailed and explained. Discussion will include what is a DST, pros and cons of DST Investments, identification strategies during COVID-19 with DSTs, how to identify a DST, meeting the exchange equation with DSTs, the role of the sponsor, the application of securities laws and the function of the PPMDSTs including What is a DST, pros and cons of DST Investments, identification strategies during COVID-19 with DSTs, how to identify a DST, meeting the exchange equation with DSTs, the role of the sponsor, the application of securities laws and the function of the PPM.
To register or for more information, CLICK HERE

Topic: Entity Issues for 1031 Advisors
Date: September 30, 2020
Time: 12 PM - 2 PM EST
Presented by Michaels and Borden
2 NY CLE Available*
Cost: Free
This presentation will focus on advanced 1031 issues concerning entities performing a 1031 exchange. Options and challenges confronting partnerships, LLCs, S and C corporations, trusts and entities seeking to perform a 1031 exchange will be explored. The presentation will include a discussion of disregarded entities and the purchase and sale of membership interests under various revenue rulings. The perils of partnership “drops and swaps” and partial exchanges will be explained along with the use of a partnership installment note. Open to the public.
To register or for more information, CLICK HERE

* There is no charge for these webinars. All are open to the public.

If NY CLE is noted as available, these programs are transitional and appropriate for both NY Newly Admitted and Experienced Attorneys for a maximum of 1 or 2 CLE hours as noted. Stewart Title Insurance Company has been certified by the New York State Continuing Legal Education Board as an Accredited Provider of continuing legal education in the State of New York.

If Ethics Credit is noted as available, the program has been approved in accordance with the requirements of the New York State Continuing Legal Education Board for a maximum of 1 ETHICS credit hour.

If NJ CLE is noted as available, the webinar has been approved by the Board on Continuing Legal Education of the Supreme Court of New Jersey for 1-2 hours of total NJ CLE credit as noted. Of these, 0 qualify as hours of credit for ethics/professionalism, and 0 qualify as hours of credit toward certification in civil trial law, criminal trial law, workers compensation law and/or matrimonial law.

Regulations and Guidelines of the NY and NJ CLE, CPE and CE Boards provide that Credit shall be awarded only for attendance at an entire course or program, or for attendance at an entire session of a course or program. No credit shall be awarded for attending a portion of a course or a portion of a session. Issuance of certificates will be subject to completion of the program and any required sign in form/evaluation. (Per New York CLE rules-If an attorney has taken this class previously and received CLE credit for it, they are NOT eligible to receive credit again for the class.

**Delaware Statutory Trust Webinar Disclosure: Eric Bicknese is a Registered Representative with Nationwide Planning Associates, Inc. Member FINRA, SIPC. Representatives are registered through, and securities are sold through Nationwide Planning Associates, Inc., Member FINRA/SIPC, located at 115 West Century Road, Suite 360, Paramus, NJ 07652. Investment advisory services are offered through NPA Asset Management, LLC. Insurance sold through licensed NPA Insurance Agency, Inc. agents. Nationwide Planning Associates and its representatives do not provide tax or legal advice. Consult with your tax advisor or attorney regarding specific tax issues. This advertisement is for information only. It is not to be construed as an offer to sell or a solicitation of an offer to buy any security or undertake any investment strategy. Specific recommendations can only be made by request and with the review of the client's investment portfolio. You are encouraged to consult your tax advisor to determine how an investment program will affect your individual tax circumstances.