

**The SBCBA Tax Committee Presents:**

**“Utilizing Private Placement Life Insurance  
For income, capital gains, and estate tax planning.”**

**When:** October 15, 2019, Noon

**Where:** Santa Barbara College of Law – ROOM 1

**MCLE:** 1 hour – General MCLE

**Speakers:** Professor Steven Horowitz and Bradley Barros

**About the Event:** Join Prof. Horowitz and Bradley Barros who will provide a review of Private Placement Life Insurance (“PPLI”) and its application to advanced income, capital gains, and estate planning initiatives.

The program will begin with a review and history of PPLI, and its background in the tax code. It will also cover recent jurisdiction and best practices, including the proper application of the investor control doctrine.

You will learn where and how PPLI can provide substantial benefits and costs savings that may otherwise be unattainable through traditional planning and life insurance. This program will include an introduction into advanced PPLI planning strategies.

We will conclude with a Q & A segment in which you may bring up case specific scenarios.

**Price: \$35 – Bring Check to Event: Make check payable to SBCBA – Tax Committee.**

**Contact Information/R.S.V.P.:** [cindy.brittain@katten.com](mailto:cindy.brittain@katten.com)

