

The Fine Art Group

ROI OF ART & COLLECTIBLES: AN IMPORTANT INVESTMENT CLASS

CREDITS: 1 FOR CFP, CPA*; 1.25 FOR CTFA

CLASS LENGTH: 1 HOUR

CLASS FORMATS AVAILABLE: LIVE GROUP, LIVE INTERACTIVE WEBINAR

COURSE REVIEW

Increasingly fine art, wine, jewelry and other collectibles have become a serious commodity that is part of a robust secondary market. Not surprisingly, these passion assets can represent for an individual a significant financial investment that requires planning and strategy.

Moreover, the market is not static and these passion assets have the capacity to appreciate to the point where the current value of certain objects far exceeds their original purchase prices. When presented with a collection of passion assets such as art, wine, jewelry and other collectibles, a financial or legal advisor can face challenges when determining whether it constitutes an investment grade significant asset or is merely a very nice, but not especially valuable, collection.

This class will help the attendee to better understand the nature of the passion asset market, the methods for assessing the value of these assets, as well as some of the legal and tax issues impacting these passion assets.

TOPICS COVERED

- Valuation issues specific to passion assets
- Passion assets that constitute a significant financial asset
- How passion assets fit into estate planning or disposition
- Determining when and how to challenge an adversary's valuation for a passion asset
- Tax implications
- Risk management strategies

ADMINISTRATIVE INFO

*This CE Class is free to attend.

*Class reviewed and updated as of 12/24/2021.

*For more information regarding administrative policies such as complaints, please contact Elizabeth Levesque at 1 (610) 254 8400.

*CPA credit is available for live group classes only.

