

UNLOCKING THE POTENTIAL OF HIDDEN WEALTH: MANAGING TANGIBLE ASSETS

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

CLASS LENGTH: 1 HOUR

CLASS FORMATS AVAILABLE: LIVE GROUP, LIVE INTERACTIVE WEBINAR

COURSE REVIEW

When are valuable objects considered appreciating assets? How does the expanding global art market affect the value of fine art, collector cars, memorabilia, wine, silver, jewelry and other collectibles owned by clients? What factors influence the value of objects? During the past several years, fine art and collectible markets have been in a continuous state of evolution expanding into new countries and to new purchasers across the globe. Due to the increased number of international buyers, tastes and desires have broadened. As a result, the value of fine art, jewelry, vintage cars and collectibles have fluctuated tremendously over the past decade due to changes in consumer demand.

Many personal collectors remain unaware of the value changes and as a result, their personal assets are not adequately protected nor managed. This presentation will educate the wealth community on the state of the art and collectible markets. The wealth community will also develop an understanding of the importance of planning for and insuring a client's valuable tangible assets. The major themes of the course include: vintage cars and collectibles have fluctuated tremendously over the past decade due to changes in consumer demand. Many personal collectors remain unaware of the value changes and as a result, their personal assets are not adequately protected nor managed.

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TOPICS COVERED

- How the expanding global art market affects the value of tangible assets
- Understanding how value is determined and the appraisal process
- Using Art as Collateral
- IRS guidelines and tax implications for tangible assets
- How to monetize tangible assets and increase assets under management
- Understanding risk management strategies for tangible assets

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.

