

## ROI of Art & Collectibles: An Important Investment Asset Class

**CE CREDIT: 1 CREDIT HOUR FOR CFP, CPA\*; 1.25 FOR CTFA**

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### Timed Agenda

#### **HISTORY OF COLLECTING & CHANGING CLIENT PROFILES (5 MINUTES)**

#### **WHY ART & COLLECTIBLES ARE AN IMPORTANT ASSET CLASS (10 MINUTES)**

- What are the structuring variables of the fine art and collectible markets?
- Reasons for explosive growth of passion assets

#### **ACCURATE APPRAISALS (5 MINUTES)**

- Role of the IRS Art Panel
- Requirements for an IRS Appraisal
- Minimize litigation

#### **DUE DILIGENCE PRIOR TO ACQUISITION (5 MINUTES)**

- Issues and case studies
- The importance of an analytic report prior to acquisition

#### **TAX IMPLICATIONS (5 MINUTES)**

- Import and export taxes
- State and city taxes
- Is the auction house charging state tax?
- Storage strategies to minimize tax impact

#### **SHIPPING, STORAGE & SEIZURES (5 MINUTES)**

- Choosing an appropriate shipping company
- Does the shipping company have TSA personnel on staff?

#### **INSTALLATION ISSUES (5 MINUTES)**

- Import and export taxes
- State and city taxes

## **RISK MANAGEMENT STRATEGIES (10 MINUTES)**

- Does the client have an appropriate risk management strategy for the asset prior to shipping?
- Scheduled Item versus Blanket Coverage
- Documentation
- Case study

## **SELLING SMART (5 MINUTES)**

- Understand the market and have a sales strategy

## **QUESTIONS & ANSWERS (5 MINUTES)**

\*CPA credit is available for live group classes only.