

CONTINUING EDUCATION COURSES

Our experts provide Continuing Education courses for family offices, wealth management firms and other legal and financial fiduciaries to collectors of art, jewelry and other valuable collectibles. With live, in-person sessions alongside interactive webinars with a Q&A, all our courses are sponsor-certified for CFP, CPA, CTFA & CLE accreditation.

CREATING PHILANTHROPIC IMPACT WITH PASSION ASSETS

Topics Covered

- What is the past and current philanthropy landscape?
- What is a Donor-Advised Fund (DAF)?
- When are art and collectibles considered a valuable asset?
- What are the benefits of gifting non-cash passion assets to a DAF?
- Case Studies

UNLOCKING THE POTENTIAL OF HIDDEN WEALTH: MANAGING TANGIBLE ASSETS

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

PICASSO OR PORSCHE? UNDERSTANDING COLLECTIONS AS A FINANCIAL ASSET

Topics Covered

- What is a valuable passion asset?
- Understanding collecting trends and market fluctuation for classic cars, art and other passion assets
- How does the global market affect value?
- Issues with passion assets
- Recognize risk management issues related to passion assets
- Using passion assets as a liquidity tool

ROI OF ART & COLLECTIBLES: AN IMPORTANT INVESTMENT CLASS

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