

HTI ANYWHERE Virtual Program (November 3-6, 2025)
62nd Annual Hawaii Tax Institute – CE Credits Offered Online

Event Start Time **HST: 8:00 AM** **PST: 10:00 AM** **CST: 12:00 PM** **EST: 1:00 PM**

- **Course Descriptions and Speakers can be found in the In-Person Conference Brochure**
- **Please Note When Scheduling: Hawaii Does Not Have Daylight Savings Time-Change**

CE Credit Available for HTI Anywhere Registrants:

ESQ – Up to 19 hours General Credits and 3 hours of Ethics and also CA Tax & EP Specialization credits
CPA – Up to 22.8 CPE Hours Field of Study = Taxes and 3 hours of Behavioral Ethics (NASBA Group Internet Based)
CTFA – Up to 19 Hours CE Credit – American Banker’s Association
CFP - Up to 19 Hours of CE Credit – CFP Board
CWS - Up to 19 Hours CE Credit – Cannon Financial
EA – Up to 22.8 CPE Hours Field of Study = Taxes and 3 hours of Behavioral Ethics (Internal Revenue Service Credits)

**Course
Duration
Min/Hrs**

MONDAY, November 3, 2025 (Hawaii Standard Time)

8:15a – 9:45a Recent Developments and Current Trends in Wealth Transfer Planning	90
(Break 15 minutes)	
10:00a - 11:00a Under the Surface: Navigating Family Dynamics in the Family Enterprise and Ethical Considerations (60 min CPE/Legal Ethics)	60
11:00a–12:00p The Nonprofit Power Hour – Current Developments, Recent Trends and Hot Topics in Tax-Exempts and Charitable Giving	60
(Break – 90 minutes lunch)	
1:30p – 2:30p Trump 2.0: The One Big Beautiful Bill Act and Tax Landscape for Investors in the U.S.	60
2:30p – 3:30p The Future of Money and the Wealth Being Created	60
(Break 30 minutes)	
4:00p – 5:00p Client Wealth Scams and Ethical Considerations: What Wealth Transfer Advisors Need to Know (60 min CPE/Legal Ethics)	60
	390 min/6.5 hrs

TUESDAY, November 4, 2025 (Hawaii Standard Time)

8:00a – 9:15a IRS Enforcement Target List: The Tax Man’s Target List for Wealth Transfer Tax Returns	75
9:15a – 10:45a Celebrity Estate Showdowns: Recent Celebrity Wealth Transfer Litigation Battles Unraveled	90
(Break 15 minutes)	
11:00a – 12:00p The INSECURE Acts of 2019 and 2022: What Every Wealth Transfer Advisor Needs to Know	60
	225 min/3.75 hrs

WEDNESDAY, November 5, 2025 (Hawaii Standard Time)

8:00a – 9:30a Recent Developments and What the IRS and the Tax Court Have to Say	90
9:30a – 10:30a The Great Unknown: What Happens When Partners Die	60
(Break 15 minutes)	
10:45a – 12:00p Recent Trends and Developments: International Tax and Wealth Transfer Planning for Globally Mobile Asian Families	75
	225 min/3.75 hrs

THURSDAY, November 6, 2025 (Hawaii Standard Time)

8:00a – 9:00a Addressing the Wealth Transfer Needs of the Modern Client – A Look into the Future	60
9:00a – 10:00a Cryptocurrency: You Can Run but You Can’t Hide	60
10:00a – 11:00a Protecting Sandcastles at High Tides: The Rising Cyber and GenAI War and Ethical Considerations (60 min CPE/Legal Ethics)	60
(Break 30 minutes)	
11:30a – 12:30p Family Office Philanthropic Compliance – Untangling Family Office Operations and Philanthropy	60
12:30a - 1:30p “Can I Just DocuSign it?” Electronic Wills, Wealth Transfer Planning Documents and Remote Signing	60
	300 min/5.0 hrs

Total Minutes Offered	1140
Total Hours Offered	19