
Tax Fundamentals of Estate Planning

May 30, 2018

National Business Institute

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PROGRAM DESCRIPTION

Gain Vital Knowledge About the Role Taxes Play in Estate Planning

Do you have the knowledge needed to insulate your clients' estate plans from regulatory storms and ensure smooth and secure preservation and transfer of wealth? This course offers a straightforward overview of tax consequences and planning strategies that will help you minimize tax burdens and ensure IRS compliance. Build a solid tax foundation for your practice. Register today!

- Find out how the current status of federal estate, income and capital gains tax affects your ongoing cases.
- Understand tax treatment and consequences of top estate planning approaches.
- Determine when Form 706 must and should be filed.
- Avoid unnecessary burden on the estate with clear delineation of income and principle.
- Classify estate assets for the most favorable taxation.
- Adapt your practices and update your clients' current plans to comply with the latest regulations.

WHO SHOULD ATTEND

This legal tax guide is designed for attorneys. It will also benefit accountants and CPAs, estate planners, investment advisers, tax specialists, trust officers, and paralegals.

COURSE CONTENT

1. Tax Fundamentals and Tax Reform Update
2. Tax Consequences of Basic Estate Planning Tools
3. Income Taxation of Trusts and Estates
4. Portability and the Federal Estate Tax Return (Form 706)
5. Basic Tax Planning With Trusts
6. Legal Ethics
7. A Survey of State Tax Laws and Considerations for Clients Who Own Property in Multiple States

CREDITS

Approved for 7.2 NJ/6.0 PA CLE

Continued

TIME

10:00 a.m. - 5:00 p.m. Eastern

LOCATION

Video Webinar

SPEAKERS

▪ **JUSTIN H. BROWN**

Shareholder
Flaster Greenberg P.C.

▪ **T. JAMES LEE**

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Fennemore Craig P.C.

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