

Tax Planning for Trusts and Estate: Get Practical Strategies to Ease Your Clients' Tax Burdens

February 26, 2013

National Business Institute

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The recent EGTRRA upheaval of estate and gift tax has brought to the forefront many challenges attorneys face in planning for and reporting taxes connected with trusts and estates. Are you prepared to insulate your clients' estate plans from regulatory storms and ensure smooth and secure preservation and transfer of wealth? This course offers practical tax planning strategies that will help you minimize tax burdens and ensure IRS compliance. Get straightforward instruction to help you through both routine tax return preparation and the final accounting.

- Decrease your client's tax burden through resourceful estate planning.
- Find out how the current status of state and federal estate tax affects your ongoing cases.
- Gain federal tax return preparation tips from experienced faculty.
- Get practical guidance through the nuts and bolts of income tax planning for trusts and estates.
- Learn how to handle common problems in distributions to minors and trusts after grantor's death.
- 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 according to the latest regulations.

Who Should Attend:

This basic-to-intermediate level program will benefit:

- Attorneys
- Estate Planners
- Investment Advisers
- Accountants
- Trust Officers
- Fiduciary Tax Specialists
- Tax Preparers
- Paralegals

Course Content:

- Gift Tax Planning

Continued

- Federal Estate Tax Update
- State Death Taxes
- Estate Tax Planning Considerations
- Post-Mortem Tax Planning Options
- Federal Estate Tax Return (Form 706)
- Income Taxation of Trusts and Estates

Location:

Doubletree Guest Suites - Mt. Laurel
515 Fellowship Road
Mount Laurel, NJ 08054

Time:

8:30 - 9:00 a.m.: Registration

9:00 a.m. - 4:30 p.m.: Seminar

(Complimentary snacks and refreshments are provided. Lunch is on your own.)

Credits:

CLE 7.20 - NJ

CLE 7.00 - NY*

CLE 6.00 - PA

Financial Planners – Financial Planners: 7.00

National Association of State Boards of Accountancy – CPE for Accountants: 7.00*

* *denotes specialty credits*