

Advanced Estate Planning: Practical Strategies for Your Clients

Help your top clients protect their estate's assets from the 45% estate tax. Once your client has accumulated wealth, varying techniques utilizing wills, foundations, and trusts can be employed to minimize or completely eliminate transfer taxes and even generate current tax deductions. This course will show you how to employ these planning devices to help your clients meet their family planning and charitable contribution goals.

HOW YOU WILL BENEFIT

Upon completion of this course, participants will be able to:

- Grasp various types of trusts and life insurance that may be used in an effective estate plan
- Utilize credits and deductions available to reduce estate and gift taxes
- Minimize estate and gift transfer taxes by advising your clients on planning techniques and opportunities
- Consider latest developments surrounding scheduled elimination of estate taxes scheduled for 2010

HIGHLIGHTS

- Valuation of assets transferred by gift or in estates
- Valuation discounts for closely held businesses and family limited partnerships
- Deductions and credits allowable in calculating estate and gift taxes
- Various trusts and life insurance products that may be employed to minimize transfer taxes
- Legislative options affecting the estate tax during the pending 2010 phase-out/phase-in period

WHO WILL BENEFIT

- Tax managers and partners who will be advising clients on more complex estate plans and working with clients' attorneys in drafting documents to implement such plans



LEVEL

Advanced

CPE CREDIT

Classroom: 8

Now accepted for PFS, CFP®, CMA, CFM and EA continuing education credit.

NASBA FIELD OF STUDY

Taxes: 8

PREREQUISITE

Basic knowledge of estate and gift taxation

PRODUCT ORDERING INFORMATION

Public Seminar: AEP

On-Site Training: AEP

(For self-study ordering information and recommended credit, visit www.cpa2biz.com/cpe)