



Advanced Estate Planning: Practical Strategies for Your Clients

Help your top clients protect their estates' 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. Learn to employ these planning devices to help clients meet their family-planning and charitable-contribution goals.

OBJECTIVES

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

- Understand what various types of trusts and life insurance may be used in an effective estate plan
- Use available credits and deductions to reduce estate and gift taxes
- Minimize estate and gift transfer taxes via 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 minimize transfer taxes
- Legislative options affecting the estate tax during the pending 2010 phase-out/phase-in period

WHO WILL BENEFIT

- CPA firms, tax managers, partners and other practitioners 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 HOURS

Classroom: 8

(Accepted for PFS, CFP®, CMA, CFM and EA continuing education credit)

NASBA FIELD OF STUDY

8-Taxes

PREREQUISITE

Basic knowledge of estate and gift taxation or completion of the AICPA course *Estate Planning Essentials: Tax Relief for Your Clients' Estates*

UPDATED CONTENT AVAILABLE

5/15/2010

COURSE ACRONYM

Public Seminar: AEP

On-Site Training: AEP