Webcast Acronym: EP14

Webcast Title: **2014 Estate And Wealth Planning Update**

Recommended CPE Credit Hours: 6 CPE/CLE Credit Hours.

Highlights:

Come join Larry Stein as he covers selected recent tax and non-tax developments that impact your tax, estate planning, and eldercare clients. In this six-hour (6 hour) CPE offering, Larry will cover many developments that will impact your wealth planning techniques. Family LLCs, Family Partnerships, Marital Portability, Trust Designs, The 3.8% Net Investment Income Tax, IRA Planning, and more will be featured. Form 709 IRS Audits, Trends, and Eldercare ideas will also be discussed. Don't miss out on the opportunity to gain new knowledge.

Learning Objectives:

Upon the successful completion of this webcast, the participants will be able to explain selected key estate and wealth planning developments that impact their wealthy, high-income clients.

Major Topics:

- Marital Portability, Rev. Proc. 2014-18, Today's Estate Plans – Is The Portability Approach For Your Client?
- Trust Design – Credit Shelter Trusts Vs. Marital Portability.
- Thing You Should Be Discussing With Your Clients Now!
- The 3.8% Net Investment Income Tax.
- Basis—The New Focus On Basis,
- IRS Gift Tax Audits – Are You Ready?
- The Growing Need For Eldercare Services.
- The Impact Of **Perry**, **Windsor**, and Rev. Rul. 2013-17/Same Sex Marriage Rulings On Tax, Estate, And Eldercare.
- Future Trends In Estate Planning.

- Family Limited Partnerships And Family LLCs.
- IRAs – Traditional IRAs, Roth IRAs, And More!
- Asset Protection Planning – Ideas That Today's Estate Planning Professional Must Know!
- Selected Cases And Private Letter Rulings/IRS Pronouncements Of Critical Importance.

Designed For: CPAs with at least six (6) years of experience. You must have a basic knowledge of estate planning and federal taxation.

NASBA Fields Of Study: Taxes.

Level: Update.

Presentation Method: Live Webcast Lecture With Questions And Answers.

Recommended CPE Credit Hours: 6 CPE/CLE Credit Hours.

Advanced Preparation: Basic knowledge of estate planning and federal taxation.

Note and Caution: I will be using the books for LSUH along with a supplement Thus, I do not want individuals taking both EP14 (this webcast) and LSUH…..Thank You….

Texas Registration: 009838

"I have registered with the Texas State Board of Public Accountancy as a CPE sponsor. This registration does not constitute an endorsement by the Board as to the quality of my CPE program."

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