

Webcast Acronym: EPRE

Webcast Title: Estate Planning For Real Estate – Part Three Of Larry Stein’s Complex Real Estate Transactions Series – Today’s Tax And Estate Planning Strategies

Recommended CPE Credit Hours: 4 CPE Credit Hours.

Highlights:

Come join Larry Stein for Part Three of his “Complex Real Estate Transactions Series...” In Part Three, Larry will cover “Estate Planning For Real Estate.” Larry will highlight several gift and estate planning techniques. Family limited partnerships and family LLCs will be covered. Larry will also cover basis step-up strategies, GRATs, FLPs, FLLCs, installment sales, grantor trusts, SCINs, QPRTs, charitable contributions, valuation issues, retained life estates, charitable remainder trusts, portability, and more. Don’t miss out on the opportunity to gain valuable knowledge.

Learning Objectives:

Upon the successful completion of this webcast, the participants will be able to explain **selected** estate and gift tax planning strategies for real estate.

Major Topics:

- Real Estate – Ownership Categories Matter!
- Family Partnerships And Family LLCs For Real Estate; Partnership Freeze Issues; Dealing With Negative Capital Accounts.
- Valuation Considerations And Issues.
- Rev. Rul. 85-13 And Income Tax Defective (Grantor) Trusts (IDGTs); Installment Sales.
- Basis, IRC 1014 Vs. 1015, And Real Estate Transactions.
- Retained Life Estates.
- Qualified Personal Residence Trusts (QPRTs) And Alternatives.
- Charitable Contributions And Charitable Remainder Trusts (CRTs).
- Portability And Form 706.

- Gifting Form 709 And IRS Audits; Grantor Retained Annuity Trusts (GRATs).
- Self-Canceling Installment Sales (SCINs), Private Annuities, And Much, Much More!

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

NASBA Fields Of Study: Taxes.

Level: Intermediate.

Presentation Method: Live Webcast Lecture With Questions And Answers.

Recommended CPE Credit Hours: 4 CPE Credit Hours.

Advanced Preparation: You must have a basic knowledge of federal estate, gift, and income taxation.

Texas Registration: 009838

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Larry Stein CPE Live Webinars
ID# 109111
Lawrence J Stein
9620 NW 82nd Street
Tamarac, FL 33321
Phone: 954.721.5588
Group Internet-Based

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