

Webcast Acronym: LSSS-PtOne

Webcast Title: Part One Of Guiding Surviving Spouses, Heirs, Beneficiaries, Estates, Trusts, And Decedents (2013) (1040, 1041, 706, And 709)

Recommended CPE Hours: 4 CPE Credit Hours.

Highlights:

Come join Larry Stein as he guides you through key moves for surviving spouses, heirs, beneficiaries, estates, trusts, and decedents. In Part One, Larry will focus on strategies for Forms 706 and 709. Don't miss out on this unique CPE offering.

Learning Objectives:

Upon the successful completion of this webcast, the participants will be able to:

1. Explain the marital portability rules.
2. Explain selected new wealth transfer tax laws.
3. Explain key Form 706 "Hot Spots."
4. Explain IRS's Form 709 Audit Initiative.

Major Topics:

- Wealth Transfer Tax Plans And Trusts Now.
- Marital Portability Rules.
- Family Records.
- Key Form 706 "Hot Spots."
- IRS Form 709 Initiative.
- New Tax Laws, IRS Pronouncements, And Planning Strategies.

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