

Webcast Acronym: LSSS-PtTwo

Webcast Title: Part Two 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 Two, Larry will cover strategies for Forms 1040 and 1041. 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 a step-by-step approach to Form 1041 tax return preparation.
2. Explain the impact of the new 3.8% net investment income tax rules (IRC 1411).
3. Explain selected Form 1040 issues that impact beneficiaries, surviving spouses, heirs, trusts, and estates.

Major Topics:

- IRAs, HSAs, And Deferral Vehicles (Qualified Plans, Etc.) – Proactive Moves.
- Marital Portability Rules.
- Income In Respect Of Decedent (IRD).
- Basis.
- Form 1041 – Step-by-Step.
- The New 38% Net Investment Income Tax.
- New Tax Laws, IRS Pronouncements, And Planning Strategies.
- “S” Trusts.

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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