

Webcast Acronym: WHIC-Pt1

Webcast Title: **Larry Stein's Tax Update And Planning Review For Wealthy High-Income Clients – Part One**

Recommended CPE Hours: 4 CPE Credit Hours.

Highlights:

Come join Larry Stein as he updates you on tax planning and compliance developments for wealthy high-income clients. In Part One (of this two-part webcast course), Larry will cover the impact of recent developments on wealthy high-income clients. Basis, Marital Portability, Estate Planning, Net Investment Income Tax Moves, and Real Estate Tax Planning Strategies will be featured. This intermediate-level course will update you on strategies for your wealthy high-income clients. Don't miss out!

Learning Objectives:

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

1. Explain **selected** basis planning and compliance statutory rules and regulations.
2. Explain the impact of **selected** tax cases and IRS pronouncements on wealthy high-income clients.
3. Explain the pros and the cons of the marital portability rules.
4. Explain the pros and the cons of the use of credit-shelter trust planning.
5. Explain the importance of marital participation documentation and the real estate professional rules.
6. Explain the impact of the net investment income tax rules on wealthy high-income clients.

Major Topics:

- Basis – Planning And Compliance.
- Income Tax Planning Moves.
- Impact Of Recent Tax Cases And IRS Developments – New Tax Law.

- New Estate Planning Paradigm – Marital Portability Vs. Credit-Shelter Family Trust; Trust Design And Flexibility.
- Real Estate Tax Moves – Wealthy High-Income Families.
- Net Investment Income Tax Planning.

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 taxation.

Prerequisites: Basic knowledge of federal taxation.

Texas Registration: 009838

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