Webcast Acronym: WHIC-Pt2

<u>Webcast Title</u>: **Larry Stein's Tax Update And Planning Review For Wealthy High-Income Clients – Part Two**

Recommended
<u>CPE Hours</u>: 4 CPE Credit Hours.

<u>Highlights</u>:

Come join Larry Stein as he updates you and reviews key tax planning techniques for your wealthy high-income clients.. In Part Two (of this two-part webcast course), Larry will discuss Succession Tax Strategies, Family Limited Partnerships and LLCs, Retirement Tax Planning, IRAs, FBAR and FATCA Developments, and the new ABLE accounts under IRC 529A. IRS Audits of Wealthy High-Income Clients will also be highlighted. Don't miss out on the opportunity to update your knowledge of wealthy high-income client tax planning techniques!

<u>Learning Objectives</u>:

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

1. Explain hot **<u>selected</u>** (recent) developments that impact Family Limited Partnerships and Family Limited Liability Companies.

2. Explain the impact of the recent **<u>Zwerner</u>** case on the FBAR requirements.

3. Explain **selected** succession planning tax strategies.

4. Explain the new IRC Section 529A ABLE account rules.

5. Explain the impact of the required minimum distribution rules on IRA tax and estate planning.

6. Explain three key family business entity strategies.

7. Explain the IRS Audit Initiatives that impact wealthy high-income clients.

<u>Major Topics</u>:

- Succession Planning – Businesses, Practices, Farms And Ranches – Next Moves.

- Family Limited Partnerships And Family Limited Liability Companies – Partnerships – What's Hot.

- Family Business Entities – Three Key Moves.

- FBAR And FATCA After The **Zwerner** Case.

- Retirement Tax Planning And IRAs.

- New ABLE Accounts (New IRC 529A Accounts).

- IRs Audits – Wealthy High-Income Clients.

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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