

Webcast Acronym: PGSS-Pt1

Webcast Title: **Larry Stein's 2015 Practical Guide To Strategies For Surviving Spouses, Heirs, Beneficiaries, Estates And Trusts – Part One**

Recommended CPE Hours: 4 CPE Credit Hours.

Highlights:

Come join Larry Stein as he discusses practical strategies for surviving spouses, heirs, beneficiaries, estates and trusts. In Part One of this two-part webcast, Larry will focus on Form 1041 tax preparation and planning, the 3.8% net investment income tax, capital gains tax strategies and basis. The final **Knight** regulations and the new ABLE accounts will also be covered.

Learning Objectives:

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

1. Explain **selected** Form 1041 tax planning and compliance strategies for estates and trusts.
2. Explain **selected** net investment income tax planning ideas for trusts, estates, surviving spouses and beneficiaries.
3. Explain the final **Knight** regulations under 1.67-4.
4. Explain the tax planning and compliance considerations for basis.

Major Topics:

- Resources To Help Your Surviving Spouses, Trusts, Estates And Heir-Beneficiary Clients.
- Trust And Estate Distributions.
- Form 1041 – Income Tax Preparation And Planning Tips For Trust And Estate Clients.
- Capital Gains Planning.
- Handling The Final **Knight** Regulations With Ease.

- Net Investment Income Tax Planning And Compliance Tips.
- The New ABLE Accounts Vs. Special Needs Trusts.
- Basis – Key Issues To Address.

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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