



## Estate Planning: An Overview Self-Study Webinar (5.5 Hours)

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Self Study Webcast  
Dec 20 - Dec 21

### Overview:

Building on the belief that everyone needs an estate plan, this self-study webinar provides a comprehensive overview of estate planning. You will:

- Feel more at ease with all the important aspects of estate planning
- Learn how to apply the most important and popular estate planning strategies and techniques
- See how to develop and evaluate estate plans for your clients

### Objective:

To give accountants and tax professionals the necessary planning information and the available tools to create quality estate plans for clients. You'll learn what estate planning is, when and how to devise a plan, who should plan, what the necessary planning information is and what tools are available.

[Detailed Learning Objectives](#) [1]

### Emphasis:

- Federal estate and gift tax issues
  - Unified credit: today and in the future
  - Marital deduction
  - Revocable transfers
  - Gift tax exemptions
- Income tax issues
- Revocable living trusts
- Probate vs. nonprobate assets
- Multistate issues
- Lifetime transfers
- Will substitutes

Identify the different legal forms of property ownership

Identify the estate transfer methods and understand the effect of property

Identify the terminology used when an individual dies without a will

Recognize the major functions of a will

Recognize the implications of the different forms of property ownership in an estate plan

Recognize the role of probate in the estate planning process

Recognize the various methods of property transfer



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Identify the requirements to an estate plan when assets are held in a living trust

Identify the steps to the probate process

Recognize the fiduciary duties of an executor

Recognize the strategies to avoid estate taxes imposed by the Tax Reform legislation

Recognize the consequences required by the regulation of federal gift taxes

Recognize the consequences required by the unified credit and estate tax inclusion of gift taxes

Identify the role of personal services going to estate planning

Identify the gift tax consequences of a charitable transfer

Identify the requirements to Section 2039(b) credit sheltering trust under the Tax Reform Act

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Identify the benefits of making transfer gifts to trusts of the donor's lifetime enjoyment

Recognize the gift tax consequences of giving a residence to a spouse as a "qualified joint interest"

Recognize the tax implications of giving less than an entire interest in property to charity

Recognize the implications of the inclusion of dependent children gifts to the estate tax credit

Recognize the consequences of the marital deduction

Identify the implications of a marital deduction in estate planning

## BottomPrerequisite:

None.

## Preparation:

No advance preparation required.

## Level of Knowledge:

Overview.

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## Source URL:

<https://www.cpeonline.com/selfstudycourse/webcast/estate-planning--an-overview-self-study-webinar-%285.5-hours%29-4>

## Links:

[1] [https://www.cpeonline.com/JavaScript:showObjectivesPopup\(\);](https://www.cpeonline.com/JavaScript:showObjectivesPopup();)



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