# **Estate & Fiduciary Tax Returns: A Practical Workshop Self-Study Webinar (11 Hours)**

ST06023H ST060

Self Study Webcast Dec 20 - Dec 21

### Overview:

Forms 1041 and 706 are possibly the most difficult and misunderstood tax returns that tax professionals prepare. In this problem-solving self-study webinar based on true-to-life scenarios, you will:

- Discover the best techniques for preparing Forms 1041 and 706
- Learn methods for gathering information from trustees and fiduciaries
- Understand the impact of various election options
- Understand the interaction between the two returns

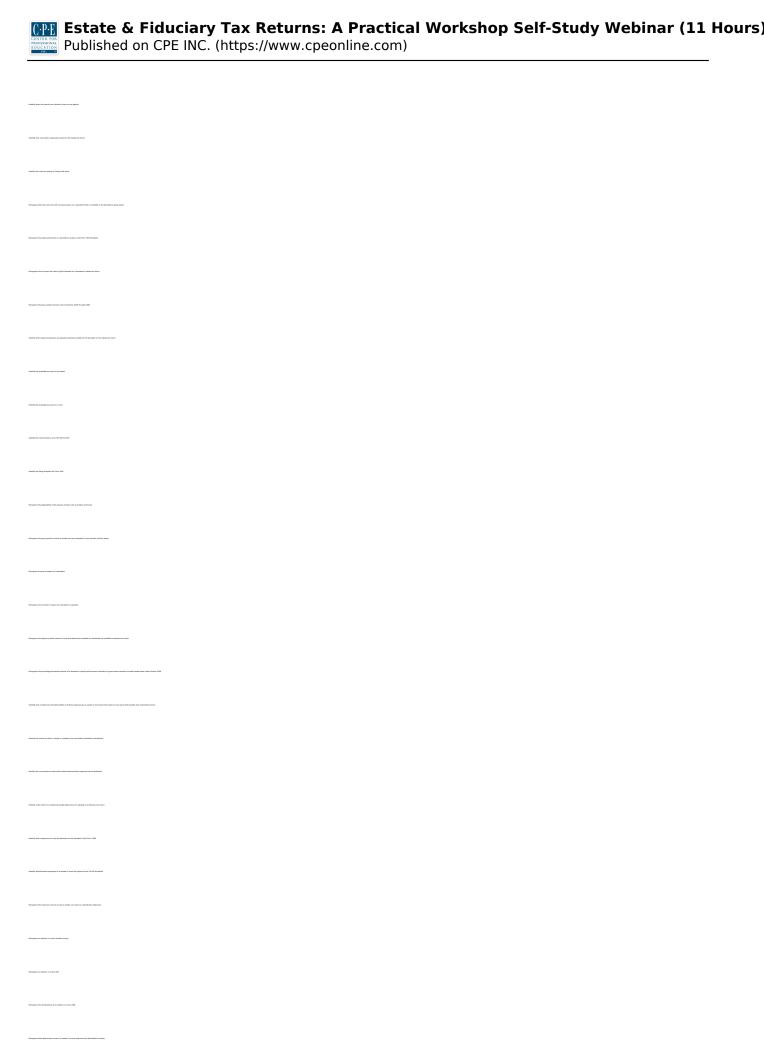
# **Objective:**

To provide preparers with a working knowledge of applicable tax laws and the hands-on ability to prepare complete and accurate fiduciary and estate tax returns. This practical self-study webinar will also equip you with effective post-mortem tax planning techniques. **Detailed Learning Objectives** [1]

## **Emphasis:**

- Filing requirements for estates and trusts
- Simple and complex trusts
- Choice of annual accounting period
- Calculation of taxable income
- Capital gains
- Tax-effective distributions to beneficiaries
- Grantor trusts
- Income in respect of a decedent
- Estimated tax rules
- Gross estate calculation
- Unified credit after the Tax Cuts and Jobs Act of 2017
- Estate elections
- Valuation issues

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# Bottom**Prerequisite:**

Basic knowledge of taxation.

# **Preparation:**

No advance preparation required.

# Level of Knowledge:

Intermediate.

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## **Source URL:**

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#### Links:

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