

Estate Tax Returns: A Practical Workshop Self-Study Webinar (5 Hours)

ST060424A
ST0604

Self Study Webcast
Dec 20 - Dec 21

Overview:

Form 706 is a very difficult and misunderstood tax return 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 Form 706 (Federal Estate Tax Return)
- Be given the necessary information to prepare estate returns
- Receive an individual breakdown for each type of specific schedule

Objective:

To provide preparers with a working knowledge of applicable tax laws and the hands-on ability to prepare complete and accurate estate tax returns.

[Detailed Learning Objectives](#) [1]

Emphasis:

- Estate tax computation
- Filing deadline
- Expansion and reunification of the applicable credit/exemption equivalent
- Valuation of estate assets
- Information needed to prepare the estate returns
- Calculation of gross estate
- Schedules
 - Schedule A—Real Estate
 - Schedule B—Stocks & Bonds
 - Schedule C—Mortgages, Notes & Cash
 - Schedule D—Life Insurance
 - Schedule E—Jointly Owned Property
 - Schedule F—Miscellaneous
 - Schedule G—Transfers During Decedent's Life
 - Schedule H—Powers of Appointment
 - Schedule I—Annuities
 - Schedule J—Funeral & Administrative Expenses
 - Schedule K—Debts of Decedent
 - Schedule L—Losses & Non-Claim Expenses
 - Schedule M—Marriage Deduction
 - Schedule O—Charitable Bequests



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Identify the responsibility for the decedent's unpaid income liability.

Recognize the year 2025 exemption amount for estate tax liability.

Identify the estate tax credit for state and local taxes.

Identify the credit for state and local taxes for the estate tax liability.

Identify when the estate tax credit for state and local taxes is applied.

Identify how the estate tax credit for state and local taxes is calculated.

Identify the credit for state and local taxes for the estate tax liability.

Recognize when the estate tax credit for state and local taxes is applied for the estate tax liability.

Recognize the proper payment of a decedent's estate on the Form 706.

Identify how to report the estate tax liability on the Form 706.

Identify the proper estate tax liability on the Form 706.

Recognize when the estate tax credit for state and local taxes is applied for the estate tax liability.

BottomPrerequisite:

None.

Preparation:

No advance preparation required.

Level of Knowledge:

Overview.

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Links:

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