

Estate Planning: An Overview Self-Study Webinar (11 Hours)

ST06524D
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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 after the Tax Cuts and Jobs Act of 2017
 - Marital deduction
 - Revocable transfers
 - Gift tax exemptions
- Income tax issues
- Planning tools
 - Credit shelter trusts
 - QTIP trusts
 - Life insurance trusts
 - Revocable living trusts
 - Generation-skipping tax planning
- Probate vs. nonprobate assets
- Multistate issues
- Lifetime transfers
- Will substitutes
- Post-death strategies

1. Identifying the different legal forms of property ownership

2. Identifying the planning goals and objectives of the client's estate

3. Identifying the major components of a plan

4. Identifying the range of planning techniques and tools available to the planner



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1. Recognize the role of the estate planner in estate planning

2. Recognize the various methods used to avoid probate

3. Identify the implications to an estate plan when assets are held in a living trust

4. Identify the steps in the probate process

5. Identify the factors that implications of estates and trusts

6. Recognize the basic functions of the personal representative

7. Recognize the principal reason estate trust funds supported by the "Rule Against Perpetuities"

8. Recognize the circumstances required for the imposition of a forced gift trust

9. Recognize the circumstances required for the imposition of a post-mortem distribution in gift trusts

10. Recognize the general gift tax exclusion

11. Identify the role of annual exclusion gifts in estate planning

12. Identify the steps to avoid a Section 2035(b) trust beneficiary trust under the Section 2035(b) trust

13. Identify the steps to avoid a Section 2035(b) trust beneficiary trust under the Section 2035(b) trust

14. Identify the benefits of making transferable gifts to members of the family in estate planning

15. Recognize the gift tax consequences of gifting a residence to a person in a "trust" to a person

16. Recognize the tax implications of gifting life insurance to a person in a "trust" to a person

17. Recognize the steps that should be taken to avoid a forced gift trust

18. Recognize the consequences of the transfer of a residence

19. Identify the significance of a transfer of a residence in estate planning

20. Identify the significance of a transfer of a residence in estate planning

21. Identify the tax implications of a transfer of a residence in estate planning

22. Identify the consequences resulting from a transfer of a residence in estate planning

23. Identify the consequences resulting from a transfer of a residence in estate planning

24. Identify the impact of a transfer of a residence in estate planning

25. Identify the consequences of a transfer of a residence in estate planning

26. Identify the impact of a transfer of a residence in estate planning

27. Recognize the role of a 2001 trust in estate planning

28. Recognize the role of the transfer of a residence in estate planning

29. Recognize the consequences of a transfer of a residence in estate planning

30. Recognize the consequences of a transfer of a residence in estate planning



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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();)