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

ST06524D ST065

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:

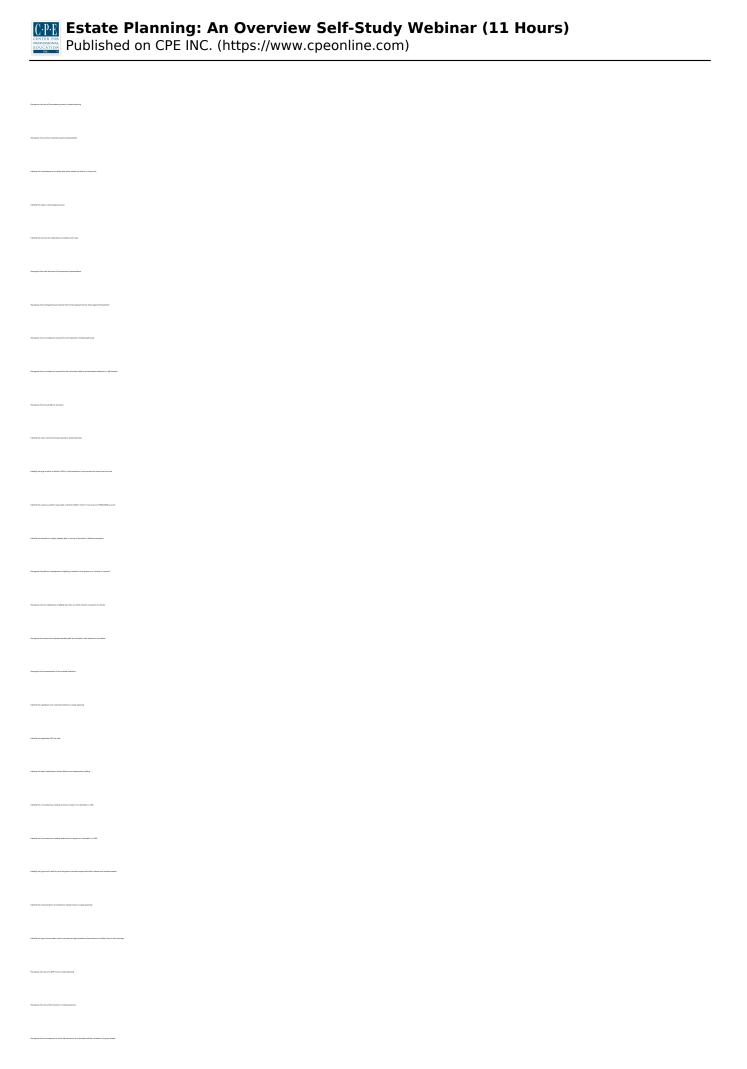
To give accountants and tax professionals the necessary planning information and the available tools to create quality estate plans for clients. You'll learn what estate planning is, when and how to devise a plan, who should plan, what the necessary planning information is and what tools are available.

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

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tilly the terminology used when an individual dan without a will	
regrise the major functions of a will	



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Bottom Prerequisite: None.
Preparation: No advance preparation required.
Level of Knowledge: Overview.
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[1] https://www.cpeonline.com/JavaScript:showObjectivesPopup();

Links: