Estate Planning – Local Issues

This course was created for the following reason: CPAs, on their evaluation forms, are constantly requesting that your Society offer a course on the state and local issues that affect a client's estate plan. Werner-Rocca Seminars, Ltd., has created a special customized course to fit your needs! This course will address many issues that are specific to your state (as outlined in the highlights below), thus allowing your members to finally be able to attend a course that is geared towards your specific state.

OBJECTIVE:

At the end of this course, you will be able to:

- List specific state and local issues regarding the specific estate planning laws and taxes of your state.

HIGHLIGHTS:

- Specific state death tax issues
- Specific issues regarding income and principal in your state
- Specific intestacy laws of your state
- Specific local issues regarding executors (personal representatives) and trustees
- How to best utilize estate planning techniques within your state
- Life insurance issues in your state, including specific trust issues

DESIGNED FOR: CPAs, EAs, attorneys, finance professionals, financial planners, bankers, and insurance agents

RECOMMENDED CPE: 8 credit hours

PREREQUISITE: None

EVENT ACRONYM: EPLI

LEVEL: Basic

FIELD OF STUDY: Taxes