

## insights

TYPES NOT MAPPED YET February 12, 2019 | TTR not mapped yet | Laura M. Duncan, Steve B. Gorin

# Fiduciary Income Tax Refresher and Update 2019

### Webinar

In this webinar the presenters will discuss tax-savings tools that can be used between now and March 6 when preparing 2018 returns. The presenters will provide a top-ten list of planning tips to help attendees save income tax going forward - tips that can help not only CPAs but also lawyers involved in drafting or trust administration. A brief overview of the Uniform Fiduciary Income and Principal Act (UFIPA), the 2018 restatement of the Uniform Principal & Income Act, will be included.

Attendees at this webinar will:

- Learn how 2017 tax law changes affect income tax planning for trusts, including the latest rules on the 20% deduction for qualified business income and the multiple trust rules
- Learn how UFIPA will help trustees optimize income tax results and actions to take when drafting estate plans whether or not UFIPA has been enacted in your jurisdiction
- Get refreshed on tools to save income tax overall when considering the trusts' or estate's and beneficiaries' overall income taxes

### CLE

The live presentation of this webinar was approved for 1.5 hour general CLE credit in California and Illinois and 1.8 hours of general CLE credit in Missouri. CLE credit is no longer available for this recording.

Presenters:

[Laura Duncan](#)

[Steve Gorin](#)

***\*Please note that this is a 90-minute presentation***

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[\*Top Ten Tactical and Strategic Issues for Fiduciary Income Tax Planning and Returns\*](#)

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