

## insights

TYPES NOT MAPPED YET February 05, 2020 | TTR not mapped yet | Laura M. Duncan, Steve B. Gorin

# Fiduciary Income Tax Refresher and Update 2020

### Webinar

In this webinar the presenters will discuss tax-savings tools that can be used between now and March 5 when preparing 2019 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 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
- Learn the impact of U.S. Supreme court case on state fiduciary income taxation
- Get refreshed on tools to save income tax overall when considering the trust's or estate's and beneficiaries' overall income taxes

### CLE

The live presentation of this webinar was approved for 1.5 hours of 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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[Fiduciary Income Tax Refresher and Update: Supporting Materials](#)

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