THOMPSON COBURN LLP

insights

TYPES NOT MAPPED YET March 03, 2022 | TTR not mapped yet | Laura M. Duncan, Steve B. Gorin

Fiduciary Income Tax Refresher and Update 2022

Webinar

In this webinar the presenters will discuss tax-savings tools that can be used between now and March 6 when preparing 2021 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. This course will also address the multiple trust rules, state fiduciary income taxation, distributions in the first 65 days of a year, and the 2021 tax bracket. We will discuss using annuities and life insurance to avoid high income tax rates in light of a recent private letter ruling.

CLE

The live presentation of this webinar was approved for 1.5 hours of general CLE credit in California, Illinois, and Texas; 1.8 hours of general CLE credit in Missouri; and 1.5 hours of professional practice CLE credit in New York. CLE credit is no longer available for this recording.

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