BROWN & STREZA LLP
Attorneys at Law

Hosting Recorded WealthCounsel Teleconference

Preparation of Gift Tax Returns

Thursday, June 13, 2019

In our office

40 Pacifica, 15th Floor

10:00 am to 11:00 am

9:30 am Continental Breakfast

10:00 am Teleconference

11:00 am Q&A

Please join us at our office for a one-hour teleconference designed to help you learn how the advisory team can collaboratively and effectively plan for your clients! As part of a monthly teleconference series offered through WealthCounsel, this teleconference will serve as an important refresher on gift tax returns as well as a review of the critical gift and GST issues encountered with preparing federal gift tax returns (Form 709). Additional topics will include the following:

- The annual exclusion rules for gifts to trusts including required Crummey notices and § 2642(c) trusts
- What should you disclose for purposes of running the gift tax statute of limitations
- The reporting of family sales, installment sales to grantor trusts and SCIN sales
- Reporting gifts to 529 Plans
- Reporting the use of a deceased spouse's unused exemption amount (DSUE)
- Understanding when gift splitting is allowed and how to report properly
- Adequate disclosure requirements and the statute of limitations

- Earn 1 hour of CLE credit (California Board of Legal Specialization - Estate Planning)
- Earn 1 hour of CPE credit

RSVP to
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