

Annual Review of Recent Estate Planning Cases ©

Objective: This course will address recent cases that impact estate planning. The focus will be on the lessons to be learned from each case.

Cases to be reviewed may involve:

- Legal duties of executors and trustees
- Income in respect of a decedent
- Valuation issues
- Will contests
- Estate and gift tax
- Generation skipping tax
- Trusts

CPE: 4 or 8 hours

Level: Overview

Category: Tax/Consulting

Prerequisite: None