

Techniques for Saving Estate & Gift Taxes

Objective: This course will address a variety of tax planning strategies that can be used to save estate, gift, and sometimes income taxes. The advantages and disadvantages of each technique will be addressed. The instructor who is an attorney and financial advisor will offer many practical tips.

What you will learn about:

- Family limited partnerships or LLCs
- Qualified personal residence trust (“QPRT”)
- Qualified retained annuity trust (“QRAT”)
- Outright gifts and gifts in trust
- Private annuity
- Installment sales
- Bargain sales
- Self-canceling notes
- Irrevocable life insurance trusts
- Non-tax factors to consider

CPE: 4 or 8 hours

Level: Overview

Category: Tax

Prerequisites: None

Instructor: Dennis J. Gerschick