

Creative Tax Strategies - The Benefits ©

Objective: Most taxpayers want to minimize their over-all tax burden. This course will address a variety of specific tax planning strategies used by individuals and businesses, from the simple to the very sophisticated. This course is designed to save income taxes and/or estate and gift taxes.

What you will learn:

- How tax planning has been encouraged by the courts
- Factors to consider in devising and implementing a tax strategy
- A number of tax strategies that have proven to be effective in the past
- Family limited partnerships
- The use of trusts
- Tax-free reorganizations
- Like-kind exchanges
- Charitable gift-giving techniques
- Partnership/LLC transactions

CPE: 4 or 8 hours

Level: Intermediate to Advanced

Category: Tax

Prerequisites: None, but this course compliments “**Creative Tax Strategies - The Hurdles**”

Instructor: Dennis J. Gerschick

Code: CTSB