Tax Planning for Investments ©

Objective: This course will address the factors individuals should consider, in order to maximize their after-tax return, on their investments. This course will address and highlight the numerous tax rules and relevant issues. Learn how to defer and minimize taxes relating to an individual's investments and discuss the pitfalls to avoid.

What you will learn:

- How investment income is taxed
- How title to investments should be held
- The types of investments an individual should make in their IRA or 401(k) plan
- The rules regarding short sales and wash sales
- The difference between an "investor" and a "trader"
- Why timing is so important with investments
- Estate and gift tax rules to consider in transferring title to investments
- Lessons from recent cases and revenue rulings
- Pitfalls to avoid

CPE: 4 hours

Level: Basic

Category: Taxation

Prerequisites: None

Instructor: Dennis J. Gerschick

Code: TPFI