Income Taxation & Estate Planning For the Non-Tax Lawyer

Objective: Every lawyer should know the basics of income taxation and estate planning. Every time money or property changes hands, the tax consequences should be considered. Divorces, litigation settlements and judgments, and the purchase and sale of property all have tax implications. Litigators, real estate, and business lawyers will all benefit from this seminar. Lawyers can help themselves by considering the applicable tax laws when handling their own affairs.

Learning objectives:

- Provide an overview of the federal income tax rules applicable to individuals
- Describe the tax planning process and how to spot opportunities
- Suggest how to select a tax advisor
- Highlight the federal estate and gift tax rules
- Note how the estate planning considerations have changed
- List different ways a non-tax lawyer can help their clients with their taxes and estate planning

CLE: 4 or 8 hours (The number of hours will determine the depth and amount of material covered)

Instructor: Dennis J. Gerschick, Esquire, CPA, PFS, CFA