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 numerous tax rules. It will also highlight the relevant issues, and the pitfalls to avoid. Learn how to defer and minimize taxes relating to an individual's investments.

Learning objectives:

- Describe how investment income is taxed
- Assess how expenses related to investments are treated
- Explain how title to investments should be held
- Note the types of investments an individual should make in their IRA or 401 (K) plan
- Highlight the rules regarding short sales and wash sales
- Note the difference between an "investor" and a "trader"
- Explain why timing is so important with investments
- Describe the estate and gift tax rules to consider in transferring assets
- Note the lessons from recent cases and IRS rulings
- Highlight the pitfalls to avoid

CPE: 4 hours

Level: Basic

Category: Taxation

Prerequisites: None

Instructor: Dennis J. Gerschick

Code: TPFI