



## Trusts and Taxation - Online

Designed for banking professionals seeking to service the high net-worth market, this course explains the specific characteristics of trusts and the objectives that trusts can accomplish for high-net-worth individuals. It also explores the various types of trusts and their particular applications, concluding with the duties of a trustee.

This course replicates the content from lesson 2 of Overview of Trusts - Online

This is an asynchronous eLearning course that can be accessed 24/7 from any internet enabled computer. Subscription period for this course is 90 days.

### Available Session(s):

Available Today

Online

USD \$60.00

Online

Instructor(s):[]

### Targeted Audience

banking professionals seeking to service the high net-worth market

### Advance Preparation

No advance preparation required.

### Learning Objectives

Students will be able to:

- Calculate Capital Gains and the Capital Gains Tax, and recognize its characteristics and impact upon one's wealth.
- Identify characteristics of the annual exclusion amount & credit shelter amount.
- Recognize the basic rules associated with gift/estate taxes, generation-skipping transfer taxes, and related tax implications.

**Level:** Basic

**CPE Credits:** 1

**Instructional Method:** Self-Study

## **Detailed Outline**

### **Trusts and Taxation**

- Capital Gains Tax
- Transfer Taxes
- Estate and Gift Taxes
- Generation Skipping Transfer Taxes

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