Trusts and Taxation - Online

This module will help you to become familiar with general trust concepts and to recognize situations where it may be useful to implement trusts as a planning strategy.

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.

Targeted Audience

banking professionals seeking to service the high net-worth market and private investors dealing with trusts.

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.

Follow-Up Courses

Duties of a Trustee - Online

Types of Trusts - Online

Characteristics of Trusts - Online

Introduction to Trusts - Online

Estate Planning - Online

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

Duration: 1 hour

For more information regarding administrative policies such as complaints and refunds, please contact our offices at 212-641-6616.