Katten

SPEAKING ENGAGEMENT

Understanding Estate, Personal, Gift & Fiduciary Income Tax Returns 2008

Presented by the Practising Law Institute

December 11–12, 2008

Partner Ronni Davidowitz will speak on "Gift Tax Return" on Friday, December 12, at 11:15 a.m.

Topics of the conference include:

- How to prepare an accurate federal estate tax return; how and when to make specific elections
- Post-mortem estate planning issues concerning a decedent's final form 1040 and estate forms 706 and 1041
- Estate planning for the marital deduction
- Reporting requirements and preparation of simple and complex trust returns
- How to reduce your client's exposure to liability when acting as trustee
- State tax issues: which state has the right to tax fiduciary income?
- Disclosure requirements of gift tax regulations
- Consequence, and timing, of estate distributions
- How and when to make GST allocations and when to elect out
- Estate administration expenses and the Hubert regulations
- Tax consequences under unitrust rules
- How do JGTRRA (Jobs and Growth Tax Relief Reconciliation Act) and EGTRRA (Economic Growth and Tax Relief Reconciliation Act) affect your clients' estate, gift and fiduciary income tax returns?

For more information, click here.

CONTACTS

For more information, contact your Katten attorney or any of the following attorneys.

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