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"This seminar far exceeded my expectations."
— Jim Bruno, EA, CFP; Westlake Village, CA

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Spidell's 2018 Estate and Trust Seminar

Amp up your trust prep skills

Despite tax reform, trust return preparation is the fastest growing area in the tax world. Join us at the 2018 Estate and Trust Seminar and be ready to prepare returns and answer your clients' trust questions.

Dig Into Basic 1041 Preparation

Presented by: Claudia Hill, EA, MBA

- Walk through preparation of the return
- Learn about the importance of reading the trust document, and knowing what to look for
- Understand the differences when the 1041 is for the estate
- Discover elections frequently associated with 1041s
- See why you might elect to take administrative expenses on the trust rather than the estate
- Review the basics, including FEINs, exemption amounts under the TCJA, and the role of the fiduciary trust
- Grasp the importance of trust accounting income
- Compute DNI — see why you need to
- See how to handle distributions of current income after the end of the trust's tax year
- Ask yourself, "What is my time and expertise worth?"

Estate and Trust Planning After TCJA

Presented by: Renée Rodda, J.D.

- Realize that your clients will still need trust and estate plans
- Learn about the benefits of different types of trusts
- Discuss whether portability is still an issue
- Take home examples of how different trusts work
- Review estate basis reporting after the TCJA

"Every CPA dealing with trusts or estates should take these classes."
— James S. McBride, CPA; Laguna Beach, CA

"A valuable presentation of all the info you do not get from reading the usual research materials."
— James F. Krueger, CPA; Burbank, CA

Your speakers:

Claudia Hill, EA, MBA
Claudia Hill is an Enrolled Agent, nationally recognized tax professional and frequent lecturer on taxation of individuals, tax planning, and representation before the IRS. She is editor-in-chief of the CCH, Inc. *Journal of Tax Practice & Procedure* and a frequent presenter for Enrolled Agents, CPAs, and other tax-related organizations including the IRS. She continues to maintain an active tax practice in Cupertino, California.

Renée Rodda, J.D.
Renée is Vice President of Spidell Publishing, Inc.® and editor of *Spidell's California Taxletter*® and Spidell's Analysis & Explanation of California Taxes®. She authors the California chapters of Spidell's Federal and California Tax Update seminar manual and is a regular speaker at Spidell's fall update seminars, summer seminars, and webinars. She has a BA from San Diego State University and is a graduate of Chapman University School of Law with a Tax Law Emphasis.

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"The materials are great, and the speakers are fantastic. They truly know their stuff! That's why I keep coming back for more"
— Alex Cuecuecha, CRTP; Temple City, CA

Seminar Price **$259**

Spidell's 2018 Estate and Trust Seminar:

City	Day	Date	Location
San Diego	Monday	October 22, 2018	San Diego Scottish Rite Event Center
Burbank	Wednesday	October 24, 2018	Pickwick Gardens Conference Center
Garden Grove	Thursday	October 25, 2018	Great Wolf Lodge
South San Francisco	Friday	October 26, 2018	South San Francisco Conference Center
San Jose	Monday	October 29, 2018	Holiday Inn San Jose — Silicon Valley
Sacramento	Tuesday	October 30, 2018	DoubleTree by Hilton Sacramento

Live Webinar *(2 days: 8:30 a.m. to noon PT)*	**On-Demand Webinar**
November 5 and 6 (Monday and Tuesday)	Available by Tuesday, November 13

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This seminar is designed to meet the requirements of the IRS Return Preparer Office; including sections 10.6 and 10.9 of Department of Treasury's Circular No. 230 (Provider No. CRA7E); the California State Board of Accountancy; the California Bar Association; the Certified Financial Planner Board of Standards (CFPs do not receive credit for webinar or self-study versions of this course), and the California Tax Education Council. This does not constitute an endorsement by these groups. The State Boards of Accountancy have final authority on the acceptance of individual courses for CPE credit. For more information regarding administrative policies such as complaints or refunds, contact Spidell Publishing at 714-776-7850. Spidell Publishing, Inc. has been approved by the California Tax Education Council to offer continuing education courses that count as credit towards the annual "continuing education" requirement imposed by the State of California for CTEC Registered Tax Preparers. A listing of additional requirements to renew tax preparer registration may be obtained by contacting CTEC at P.O. Box 2890, Sacramento, CA 95812-2890, or by phone at 877-850-2832, or on the internet at www.CTEC.org.

Designation	CPE Hours
CPA and CFP	8 Tax
EA	8 Federal Tax
CRTP (CTEC)	8 Federal Tax
CA Attorney	6.75 General MCLE

This seminar is designed to meet the requirements for 8 hours of continuing education for CPAs and CFPs; up to 8 federal tax hours for EAs and CRTPs; and up to 6.75 hours of General MCLE credit for attorneys.

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