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The All-Star Tax Series

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Join us for the next course in the 2019–2020 series:

Tax Planning Strategies for Family Groups

Broadcast Date

Broadcast Time

Broadcast Location

Webinar Dates: July 17, July 25

The Tax Cuts and Jobs Act made many changes to the Internal Revenue Code that impact families in a variety of ways. Because the new law enacted so many tax benefits for families, tax practitioners must understand and be able to apply these changes to effectively advise their clients. This program summarizes the major changes impacting families and minors. The panelists will discuss planning strategies families can implement to address these changes in the most effective way.

Key Topics

- Increase in the child tax credit and additional child tax credit
- Credit for other dependents
- The increased standard deduction and loss of the personal and dependency exemptions
- Changes to the kiddie tax
- Section 529 plan changes
- New strategies for disability and special needs planning with 529A ABLE accounts
- Forgiveness of student loans
- Repeal of the alimony deduction
- Sale of life insurance and viatical settlements

Panelists

Claudia Hill, EA
Jeffrey Jacobs, Esq.
Lance Weiss, CPA, CVA
Michael J. Tucker, CPA, LL.M. (moderator)
Panelists are subject to change.

Details

Course Level: Basic

CPE and IRS Credits: Three hours

IRS Credit Category: Federal tax law

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