

## 1041 Seminar

### Central/South Central Joint Education Committee

# Trusts & Estates 1041s—The New Rules

## Monday, October 24, 2016

**Lancaster, Eden Resort**  
**222 Eden Rd.**  
**Lancaster, PA 17601**  
**Hotel Phone: 717-569-6444**

**Registration: 7:30 AM**  
**Start/End Time: 8:00 AM–4:30 PM**  
**Course Level: Basic**  
**CPE: 8 Hours Federal Tax**  
*\*Also qualifies for 7 hours CLE credits for Attorneys*

**SPEAKER: Bill Leonard, CPA, CFFA**

PSTAP is an approved continuing professional education sponsor.  
 PA #PX-000501L, NJ #20CE0015920, NY #002280, IRS CE #E3S5R

**Trusts & Estates 1041s - The New Rules** Upon completion of this course, you will be able to Apply the latest updates and walk clients through the latest changes to the tax laws; Explain the various types of trusts to clients and provide advantages and disadvantages of each; Properly handle the accounting for trusts and estates; Properly report various types of income on most Form 1041 trust and estate returns; Properly include various types of expenses on most Form 1041 trust and estate returns; File various items affecting Form 1041 trust and estate returns including Schedule I form AMT, estimated tax payments, and extensions; Utilize techniques to avoid entity level tax; and more.

**PSTAP Members: \$215**

**Non Members: \$280**

- Registration fee includes seminar workbook, continental breakfast, lunch & refreshment breaks
- **REGISTER** Online: [www.pstapcpe.com](http://www.pstapcpe.com) \*\*Mail: PSTAP, Attn: Seminar Registrations, 20 Erford Road, Suite 200A, Lemoyne, PA 17043
- Seminar Confirmations—Sent upon registration, via email only—please provide your email address below
- Questions??? Contact PSTAP Executive Office at 1-800-270-3352 or by email at [info@pstap.org](mailto:info@pstap.org)
- Refund Policy: Cancellations received by **Oct. 17, 2016** will be refunded less a \$35 service fee, 50% refunded thereafter.
- No Show—No Refund—No Exceptions. Overnight Accommodations: Call the Eden Resort 717-569-6444.

Registration Form: (one form per registration—photocopy for additional registrants)

**REGISTRATION DEADLINE: 10/17/16**

First Name \_\_\_\_\_ MI \_\_\_\_\_ Last \_\_\_\_\_ PSTAP ID #: \_\_\_\_\_ PTIN # \_\_\_\_\_

Firm: \_\_\_\_\_ Phone: ( ) \_\_\_\_\_

Street Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Email Address \_\_\_\_\_ License Number—CPA/PA—Required \_\_\_\_\_

Please indicate Rate

PSTAP Member **\$215**

Non Member **\$280**

Check Enclosed—Payable to PSTAP Joint Education Committee —Mailed to the above address \*\*

VISA Acct # \_\_\_\_\_ Exp: \_\_\_\_\_ CVV: \_\_\_\_\_

MASTERCARD Acct # \_\_\_\_\_ Exp: \_\_\_\_\_ CVV: \_\_\_\_\_

\*Please include additional \$10.50 for CLE credits

Signature: \_\_\_\_\_

**\*Please do not combine meeting & seminar fees on same check. JECJennings1041 1112016**

## **Trusts & Estates 1041's—The New Rules**

Bill Leonard, CPA, CFFA and Charlie Slade, JD, CPA wrote this course from the point of view of the tax expert AND the lawyer. Acclaimed as "the best estates & trusts course ever-these guys are great!" It covers how to prepare the forms, how to do the accounting and how to plan for the future.

### **Speaker Bio:**

Bill Leonard CPA, CFFA holds licenses and memberships in Massachusetts, Rhode Island, Alaska and Singapore. He is the sole shareholder of W.A. Leonard & Company, P.C. and PT W.A. Leonard employing sixteen multi-lingual professionals that focus on meeting the needs of small businesses, individuals and fiduciaries. A graduate of Bentley University and Babson College, Bill has been in practice since 1981. He has over twenty years of college and seminar teaching experience.