



NORTHEAST & LEHIGH VALLEY CHAPTERS

PA: PX-000501L , NJ: 20CE00159200, NY: 002280, IRS: E3S5R

Form 1041 Estates & Trusts Seminar

Wednesday, October 26, 2016

The Woodlands Inn
1073 Highway 315
Wilkes Barre, PA 18702
Hotel Phone: (570) 824-9831

Registration 7:00 AM
CPE 8:00 AM - 4:30 PM

CPE: 8 Hours Federal Tax
Also qualifies for 7 Hours CLE for Attorneys

REGISTRATION DEADLINE: OCTOBER 21, 2016

LATE REGISTRATION FEE OF \$25 ON SPACE AVAILABLE BASIS

SPEAKER: Gear Up Thomson Reuters Seminar Speakers

NAME: _____ ID # _____ PTIN # _____

See Mailing Label

Address: _____ City/State/Zip _____

Email Address: _____ Phone: () _____ Fax: () _____

☐ **MEMBER (\$190)**

☐ **NON MEMBER (\$265)**

Please include \$10.50 for CLE credits

☐ Check made payable to: Northeast CHAPTER PSTAP is enclosed. **

☐ Credit Card: ____MC ____Visa Acct # _____ Exp: _____

Signature: _____ CVV#: _____ (on back)

MAIL Form To: PSTAP Executive Office Attn: PSTAP Northeast Chapter
20 Erford Road, Suite 200A, Lemoyne, PA 17043
FAX: 717-737-6847 Questions?: 1-800-270-3352

- Registration fee includes seminar workbook, continental breakfast, lunch & refreshment breaks
- Cancellations received before **Oct., 21, 2016** will be refunded in full, 50% is refundable thereafter.
- One registrant per form—you may reproduce this form.

CPE certificates will be available for download on our website www.pstap.org following the seminar.
No Shows are Ineligible for Refunds. All topics subject to change. ** Please do not combine fees for different events on same check.

Gear Up Thomson Reuters form 1041 Estates & Trusts Seminar Overview:

This is a two-pronged course designed to get you started in the practice of estates and trusts as well as a great update for the experienced tax professional covering all major developments since 2011. The morning session covers estate and trust terminology, fiduciary income taxation, trust accounting principles and a comprehensive explanation of income distribution deduction. In the afternoon, Form 706 is examined in detail. The many changes enacted since 2011 are reviewed with particular emphasis on portability (with detailed examples) and coverage of the new consistency reporting requirements. The “What’s New” chapter has been completely updated with recent rulings and interesting new cases. Post-mortem elections including alternate valuation date and disclaimers are discussed as these areas are of particular interest to the tax preparer.



Check out our website—www.pstap.org