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Jennings-TaxSpeaker
1041's for Trusts & Estates Seminar
Wednesday, October 17, 2018

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: OCT. 12, 2018
LATE REGISTRATION FEE OF $25 ON SPACE AVAILABLE BASIS

SPEAKER: Bill Leonard, CPA, MAFF, CGMA

NAME: _____ID #_____ PTIN #_____
See Mailing Label
Address: _____**City/State/Zip**_____

Email Address:_____ **Phone:** (___)_____ **Fax:** (__)_____

☐ **MEMBER ($190)** ☐ **NON MEMBER ($240)**
Please include $10.50 for CLE credits

New! Please Choose a Meal → ☐ **Meat Lasagna** ☐ **Vegetable Lasagna**

☐ Check made payable to: Northeast CHAPTER PSTAP is enclosed.**
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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. 12, 2018** will be refunded in full, 50% is refundable thereafter. No shows are ineligible for refunds
- 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.
All topics subject to change. ** Please do not combine fees for different events on same check.

Jennings-TaxSpeaker 1041's for Trusts and Estates Course Description:

This course is written and taught by practicing attorney/CPA Charlie Slade and national trust and estate tax expert Bill Leonard CPA from the point of view of actual practitioners. Beginning with a discussion of when returns are required, Charlie & Bill guide participants through the 1041 preparation maze while providing hands-on guidance from real, expert practitioners regarding types of trusts, return preparation, compliance, allocations and distributions. Updated for the latest laws in 2018, the course also discusses administration and accounting in 1041's and practical planning advice throughout the day.

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.

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.

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