What Do I Need to Know about PA Inheritance Tax
Presented by Linda S. Bleil, EA
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This is a 4-hour Continuing Education Program that discusses the Pennsylvania Inheritance Tax for residents and non-residents (those who own real estate in PA or have an interest in a PA-based company). You will learn:

What is and is not taxable	What is and is not a deduction
Who is taxed and at what rate	What happens if I don't have a Will
How is the estate valued	When is the tax due and how do I pay
Are retirement accounts reported	Are UGMA accounts reported
Are POD and TOD accounts reported	Are ITF accounts reported
Are 529 accounts reported	Are joint accounts with others reported
Is a Trust reported	Is joint real estate with others reported
Can I shelter assets in a Trust	Is life insurance reported
Are gifts reported	Are charitable gifts reported
How is a business valued	Is personal property reported
How does the state know all of this	Do I need to be an attorney to do this
What is the procedure for all of this	What else should I know
Is there software for this	Are there courses I can take

If your clients aren't asking you to help them with inheritance tax, someday you will encounter this situation with a family member or close friend. Plan for your estate too!

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Linda Bleil is an Enrolled Agent from the Pittsburgh, PA area. She has over 50 years-experience in estates including 8 years with a major bank Trust department and the last 42 years on her own. Linda's practice focuses on individual income tax and estate and trust tax and accounting issues.

Linda has been a guest speaker on various estate tax matters for the PA Society of Enrolled Agents and the Ohio Society of Enrolled Agents. She has also presented for the National Association of Tax Professionals state chapters in Pennsylvania, Maryland, New Jersey, and Virginia. PSTAP members in Pittsburgh, Harrisburg, Springfield and Wilks-Barre have heard Linda speak as well. She is the co-author of "Estates—Basics in Accounting and Taxes."

Linda is a member of NAEA where she has served as Director, Treasurer, Secretary and President. Linda is also a Fellow of the National Tax Practice Institute. She currently serves on the Duquesne University Gift Planning Advisory Council.