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STEVEN G. SIEGEL

INCOME TAXATION OF ESTATES AND TRUSTS: PREPARATION OF FORM 1041

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“A truly excellent presentation. Thorough explanation, including the sample problems. It was great.”

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The IRS has announced its plan to **increase** the **audit** of income tax returns of estates and trusts (Form 1041). This excellent **2.5-hour February 19, 2007** presentation gives you a **thorough explanation** of **how to prepare** the Form 1041 and accompanying Schedules.

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STEVEN G. SIEGEL is president of The Siegel Group, Morristown, New Jersey, a national consulting firm providing tax and estate planning advice to individuals and businesses. Mr. Siegel holds a BS from Georgetown University, a JD from Harvard Law School and an LLM in Taxation from New York University. He is the author of several books, including *The Estate Planning Course Book*. Mr. Siegel is a nationally-recognized writer and speaker who has lectured extensively throughout the United States on tax, business and estate planning topics.

COMPANION: For a **useful, more detailed explanation** (2.5 hours, 104-page book) of the relevant tax law, you may be interested in Mr. Siegel’s November 2006 talk: **Income Taxation Of Estates And Trusts: The Law**. For full details go to www.nlfcl.com (click on the **Estates, Gifts, Trusts And Tax Materials** link on the Homepage) or call 302/656-4757.

TOPICS

- ✓ **Understand The Operative Documents**
- ✓ **Overview Of Basic Concepts And Issues**
- ✓ **Income Reportable By Fiduciaries**
 - line-by-line analysis
 - lines 1-8
- ✓ **Deductions Available**
 - line-by-line analysis
 - lines 10-20
 - Schedules A and B
- ✓ **Tax Calculations, Credits And Payments**
 - line-by-line analysis
 - lines 22-29
 - lines 1-7 of Schedule G
 - lines 1-9 of “Other Information”
- ✓ **Distributions In The Year Of Termination**
- ✓ **Alternative Minimum Tax (Schedule I)**
- ✓ **Six (6) Practical Sample Problems With Completed Tax Forms: *Ongoing Estate, Simple Trust, Simple Trust With Capital Gains, Complex Trust, Final Year Estate, Grantor Trust***
- ✓ **Three (3) Tax Forms (7004, 1041-T, 8855)**



COMPLETE TABLE OF CONTENTS

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- **Overview Of Some Basic Concepts And Issues**
- **Income Reportable By Fiduciaries**
- **Deductions Available To Fiduciaries**
- **Tax Calculations, Credits And Payments**
- **Distributions In The Year Of Termination**
- **Trusts And Estates And The Alternative Minimum Tax**
- **Six (6) Sample Problems – How To Approach Form 1041 Preparation: Ongoing Estate, Simple Trust, Simple Trust With Capital Gains, Complex Trust, Final Year Estate, Grantor Trust**
- **Three (3) Blank Tax Forms (7004, 1041-T, 8855)**

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