BROWN & STREZA LLP
Attorneys at Law

Hosting WealthCounsel Teleconference

Gift Tax Returns - Form 709

Tuesday, September 22, 2020

via Zoom

9:00 am to 10:15 am (PST)

9:00 am Teleconference

10:00 am Q&A

Please join us via Zoom for a one-hour teleconference designed to help you learn how the advisory team can collaboratively and effectively plan for your clients. As part of a monthly teleconference series offered through WealthCounsel, this teleconference discusses gift tax returns and reviews the critical gift tax issues encountered with preparing federal gift tax returns (Form 709). Unlike income tax returns, mistakes are not quickly discovered unless audited and are often uncovered when the client dies – providing years for interest and penalties to accrue. We will discuss:

- Filing obligations
- Annual exclusion gifting and Crummy Letters
- Using a deceased spouse's portable exemption amount ("DSUEA")
- Reporting Installment Sales, Loans, Private Annuities, GRATs, QPRTs, and CRTs
- Reporting front-loaded 529 plans

- Earn 1 hour of CFP credit pending (National CFP Board)
- Earn 1 hour of CLE credit (California Board of Legal Specialization - Estate Planning)
- Earn 1 hour of CPE credit

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