20·20 tax training

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Level Four

Module Information

Program Duration	**3 days**
Prerequisite	**4+ Years Professional Experience**
Level of Instruction	**Advanced**
Delivery Method	**Group / Live**
CPE Credits	**24 hours** Tax – 21 Personal Development (PD) – 3
Advanced Preparation	**None**

Learning Objectives

- Explore the core limited liability company and partnership tax issues
- Explore other advanced business income tax topics such as state tax nexus, various tax elections, accounting methods, and business sales and exchanges
- Review laws governing foreign taxes and divorce
- Brainstorm tax planning strategies
- Discuss estate and trust taxation, and multi-generational gifting strategies
- Apply professional skills of supervision, networking and work life balance

Level Four Summary — Level Four is designed to advance the skills and knowledge of participants. This program covers advanced individual and business topics such as divorce, foreign taxes, and state nexus. Significant portions of the course focuses on LLC and Partnership taxes, business sales and exchanges, accounting methods, as well as estate, gift and trust tax law. The program also provides professional skills training focused on managing, supervising, training and delegating.

Module Summary

Business Tax Topics .... **12 hours**

- LLC and Partnership Tax Issues
  - Basis and At-Risk
  - Capital Accounts
  - Partner Distributions
  - Partner Contributions
  - Payments to Partners
- Various Tax Elections
- State Tax Nexus
- Equity vs Asset Sales & Exchanges
- Accounting Methods

Individual Tax Topics .... **5 hours**

- Foreign Taxes
- Tax Planning
- Divorce

Estates & Trusts .... **4 hours**

- Estate Tax Law
- Types of Trusts
- Gift Taxes

Foundational Skills .... **3 hours**

- Supervising, Training and Delegating
- Work Life Balance
- Meeting People & Networking

The course material utilizes case studies pulled from current, real life tax scenarios.

Contact 20•20 Tax Training

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