



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 – 18

Personal Development (PD) – 6

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, and various tax elections
- 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 and communication

Contact 20-20 Tax Training

Beckie Reilly, CPA

Executive VP – Sales

beckie.reilly@20-20services.com

20-20 Tax Training

www.20-20services.com

20-20 Tax Training is a division of 20-20 Services LLC.®

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, 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 **9 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

Individual Tax Topics **5 hours**

- Foreign Taxes
- Tax Planning
- Divorce

Estates & Trusts **4 hours**

- Estate Tax Law
- Types of Trusts
- Gift Taxes

Foundational Skills **6 hours**

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

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



20-20 Services LLC is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org.