

Winstead University: Deep-Six Versus 706 - Practical Tips on What Estate and Gift Tax Returns Require

Presented by Stephanie Loomis-Price

10.17.16

12:00 - 1:00 p.m.

Did you file a record number of gift tax returns on behalf of your clients in recent years? Do you use formula clauses for gifts and sales? How do you report them? This presentation will address audit-proofing (to the extent possible), including the reporting of formula transfers that may be highly scrutinized.

This course has been approved for MCLE credit by the State Bar of Texas Committee on MCLE in the amount of 1 credit hour.

Live in The Woodlands, Texas

Winstead PC

24 Waterway Avenue, Suite 500

The Woodlands, Texas 77380

Webcast/videoconference available in these other Winstead offices:

Winstead PC

401 Congress Ave. Suite 2100

Austin, TX 78701

Winstead PC

2000 Fifth Third Center

201 North Tryon Street

Charlotte, NC 28202

Winstead PC

500 Winstead Bldg.

2728 N. Harwood St.

Dallas, TX 75201

Winstead PC

300 Throckmorton Street, Suite 1700

Fort Worth, Texas 76102

Winstead PC

1100 JPMorgan Chase Tower

600 Travis Street

Houston, TX 77002

Winstead PC

300 Convent Street, Suite 2700

San Antonio, Texas 78205

For information on attending, contact Marianne Lee at mlee@winstead.com.