Use of Trusts in Tax and Estate Planning

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USE OF TRUSTS IN TAX AND ESTATE PLANNING

Trusts are used on an ever-increasing basis to plan for wealth and succession objectives for medium and high worth clients. The advisor who can assist with that process enjoys the opportunity to nail down a long-term, potentially intergenerational connection to the client and their family.

CONTENT DESCRIPTION & KEY CONCEPTS

Every financial advisor who discusses tax, financial or investment plans with clients should have a basic understanding of the taxation of trusts in order to discuss estate planning options with clients. This course provides a detailed primer in the subject area featuring common true to life scenarios. **Recently updated**, the Use of Trusts course offered by Knowledge Bureau offers everything from basic trusts mechanics to trusts for disabled beneficiaries.

CERTIFIED SKILLSETS YOU WILL LEARN

The student will learn:

- How to explain trusts in simple terms to clients
- How to reduce income taxes using charitable remainder trusts, estate freezes, and testamentary trusts
- How to avoid probate fees using alter ego trusts and RRSP trusts
- How to protect children from gold-diggers, protect beneficiaries from poor financial judgment using control designed trusts
- How to help clients help their disabled beneficiaries
- How to identify opportunities and needs for insurance products as part of trust planning
- How to become part of a succession planning team that advises the next generation

Study Time: 30 hours

COURSE COMPONENTS

MULTI MEDIA INTRODUCTION – Your virtual instructor overviews key concepts in each chapter.

KNOWLEDGE JOURNAL TEXTBOOK – A full course manual containing detailed study materials, chapter by chapter.

EVERGREEN EXPLANATORY NOTES – A comprehensive reference library.

PRACTICE MANAGEMENT THESIS – Your formal case study online: a great review before your final exam.

TESTING – Chapters end with multiple-choice quizzes and true-to-life cases. A comprehensive final exam is written at the end of your studies.

ACCREDITATION – Earn 30 CE/CPD credits per course.

TABLE OF CONTENTS

STEP 1: STUDENT IDENTIFICATION

Name ______ Returning Student ID #

Company ______

Address ______

City ______ Province

Postal Code ______ Email

Phone with Area Code ______ Fax

Referred By ______ Current Designations/Licensing

STEP 2: TUITION FEES

☐ **Single Course Tuition Fee** **$795**

☐ **Electronic Textbooks** **No Extra Charge**

☐ **Hard Copy Textbooks and Delivery** **$ 95**

OR

☐ **Choose Certified Skills Diploma or Designation Program and save**

See www.knowledgebureau.com for tuition funding options and details on qualifying for tax credits.

STEP 3: PAYMENT PLANS

☐ **Full Payment Plan** (Branch Office study groups save 10%):
Number of Courses: _______ **A** x fee from Step 2 = **B** below

TOTAL TUITION FEES:	$_____________B
Hard Copy and Delivery (see step 2)	$_____________C
SUBTOTAL (B + C)	$_____________D
GST/HST (885004713RT001)	$_____________E
TOTAL DUE (D + E)	$_____________F

☐ **EZ-Pay Instalment Plan:** Call 1-866-953-4769 for details.

STEP 4: PAYMENT METHODS

☐ **CREDIT CARD:** ☐ Visa ☐ MC ☐ Amex Expiry Date ___ / ___

Card Number ____

Name on Card ____

Signature ____

STEP 5: REGISTRATION OPTIONS

Phone: 1-866-953-4769 **Fax:** 1-204-953-4762
Online: www.knowledgebureau.com
Email: registrar@knowledgebureau.com

☐ Unless box is checked, I provide consent for you to store my contact information and inform me of my progress and future educational opportunities.