

Probate and Estate Tax Return Preparation for Paralegals

Presented in Partnership with Lorman Education Services



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July 9th, 2008 - (1:00 PM - 2:30 PM Eastern)

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Highlights:

Whether you prepare United States estate (and generation skipping) tax returns (Form 706) for your clients or just gather the information for the preparer, this teleconference introduces you to the process and will teach what needs to be done and how to do it. This teleconference includes a practical checklist for gathering the necessary information and demonstrates the application of the work by describing where the information is used on Form 706. This nuts and bolts presentation will be useful if you are new to this area and will be a good refresher on how to do this critical task in the trust or estate settlement process.

[View Complete Agenda](#)

Who Should Attend:

Paralegals, legal assistants and attorneys

Faculty:

Mark A. Bregman, J.D., Bregman & Burt, A Professional Corporation Todd W. Skinner, CPA, Skinner Tameron & Company, LLP

Credits:

Continuing Education Credit awarded for the following designations: NALA, NFPA (Pending), Paralegals, Additional credit may be available upon request. Contact Lorman at 866-352-9540 for further information. Call (866) 352-9540 for further credit information.

To Register:

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By phone: Call our Customer Service Department at (866) 352-9539

By e-mail: customerservice@lorman.com

By fax: Print and fill out the following form and fax to (715) 833-3953

By mail: Print and fill out the following form and mail to: Lorman Education Services, Dept 5382, PO Box 2933, Milwaukee, WI 53201-2933

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Name: _____

Title: _____ E-mail: _____

Approving Manager: _____

Title: _____ E-mail: _____

Company: _____

Address: _____

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Fax: _____

Tuition for members:

_____ \$188 each for a single registration

_____ \$178 each for two or more from the same organization

*Residents of SD and WV, please add applicable sales tax to your payment.

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Substitute registrants are welcome and may be named at any time. If you cancel six or more business days in advance, you will receive a full refund, less a \$20.00 service charge (\$30.00 for Canadian registrations). If you cancel within five business days you are not entitled to a cash refund. However, as a courtesy, we will allow you to apply your payment toward a future Lorman seminar within one year from the date you cancel. Your payment is transferable. Please note that if you do not attend and you do not cancel as described above, you are responsible for the entire payment.

For more information regarding administrative policies or to make suggestions, please contact our offices at 866-352-9539.

This seminar may be recorded. Your registration constitutes your consent to such recording.



Lorman Education Services | 2510 Alpine Rd. | Eau Claire, WI | 54703
