Death and Taxes

Things to consider when closing transactions with deceased parties

April 21, 2022
5:30 pm - 6:30 pm

CLICK HERE TO REGISTER

Topics include:

- Estate Basics and Working with Fiduciaries
- Estate Documents: POAs, Wills, Trusts
- Fiduciaries: Background and Types
- Administration: Steps and Timing for Probate (testacy and intestacy) and Nonprobate
- 1099-S Reporting
  - Is 1099-S Reporting always required?
  - Who is subject to reporting?
  - Review Dos and Don’ts for Tax Reporting with Deceased Parties

Instructors:

Jan Dilley Borgstadt, Attorney

Danielle Foley, Escrow Advisor

Zoom Link will be sent to you via email after registering

Location:

Virtual - via Zoom

Online only, not classroom based

$25 ASEA Members **$50 Non- Members**

1 Education Credit

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