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California's Taxation Of Trust Income And Associated Planning Opportunities

DATE

August 27, 2020
10 a.m.-11 a.m. (Pacific)

SPEAKERS



**Stanley
Heyman**
Partner



**James R.
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**David A.
Coronel, CPA**
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California presents unique challenges in the state's tax treatment of trust income because it imposes a wide variety of rules. While California residents can take advantage of other states' laws to defer tax on trust income, California law imposes additional rules that tax this income in later years. This webinar will explore the operation of the tax laws in California; the opportunities offered by other jurisdictions; the interaction of California and other laws; and best practices for achieving the best planning results.

The presenters will discuss how California residents and their beneficiaries should consider planning opportunities that address California's treatment of trust income and how estate planning that utilizes advantages offered by different state laws can yield benefits in this regard.

Questions? [Email Lindsay Hulliberger](#) or call 312-214-5661.

