

NCSA FALL PROFESSIONAL ACCOUNTING SEMINAR

1041's For Trusts & Estates

Presented by **Bill Leonard of TaxSpeaker (Jennings Seminars)**

October 4, 2019

The North Carolina Society of Accountants will present its Fall Professional Accounting Seminar (PAS) on October 4, 2019, at the Embassy Suites, 204 Centreport Drive, Greensboro, NC

COURSE LEVEL: INTERMEDIATE	METHOD: LECTURE & DISCUSSION
PREREQUISITE: 2-4 YEARS TAX PREPARATION	ADVANCE PREPARATION: NONE
FIELD OF STUDY: 1041'S FOR TRUSTS & ESTATES	IRS PROGRAM NUMBER: A8FPT-T-00067-19-I
IRS APPROVED CREDIT HOURS AVAILABLE	8 HRS FEDERAL TAX

Friday, October 4th, 2019

Registration 7:30 a.m. prior to class. Seminar 8:00a.m.-5:00 p.m.

1041's For Trusts & Estates

This course is written and taught by practicing CPA and national trust and estate tax expert Bill Leonard CPA from the point of view of actual practitioners. Beginning with a discussion of when returns are required, we guide participants through the 1041 preparation maze while providing hands-on guidance from real, expert practitioners regarding types of trusts, return preparation, compliance, allocations and distributions. Updated for the TCJA of 2018 and the latest laws in 2019, the course also discusses administration and accounting in 1041's and practical planning advice throughout the day.

Bill Leonard CPA, MAFF, CGMA

Bill Leonard CPA, CFFA holds licenses and memberships in Massachusetts, Rhode Island, Alaska and Singapore. He is the sole shareholder of W.A. Leonard & Company, P.C. and PT W.A. Leonard employing sixteen multi-lingual professionals that focus on meeting the needs of small businesses, individuals and fiduciaries. A graduate of Bentley University and Babson College, Bill has been in practice since 1981. He has over twenty years of college and seminar teaching experience.



APPROVED
CONTINUING EDUCATION
PROVIDER

NCSA is Provider #A8FPT for
Enrolled Agents &
Other Tax Return Preparers



REGISTRATION

Registration includes lunch and breaks on
 Friday, October 4th, 2019.
 Registration will begin at 7:30 a.m. on October 4th
 Seminar 8:00 a.m.-5:00 p.m.

**Please complete and return this form
 to the NCSA office:**

Post Office Box 1126, Conover, NC 28613
 Phone: 828-695-2520 Fax: 828-695-2522 Email: Candace@ncsa1947.org

	Before September 16 th	After September 16 th
Each Participant	\$259.00	\$279.00

Hotel Information

Embassy Suites by Hilton Greensboro Airport,
 204 Centreport Drive, Greensboro, NC

Rooms must be reserved by **September 5, 2019**, for \$119.00 + tax per room, this includes a full breakfast. Please make your reservations directly with the hotel by calling 336-668-4535 for reservations and tell them your discount code is **BLS**. There are limited rooms blocked for this event. Please make your reservation promptly. You will not be offered the group rate when the block is sold out even if it is before September 5th. Use this link to book your hotel room online:

https://embassysuites.hilton.com/en/es/groups/personalized/G/GSOGBES-BLS-20191003/index.jhtml?WT.mc_id=POG

Name

Address

City, State, Zip

Telephone

PTIN#

Email Address

METHOD OF PAYMENT: CHECK ENCLOSED BILL MY CARD

Credit Card Number

Exp. Date

Security Code on back of card

Billing Zip code for Card

Signature

Cancellation Policy

You can reach the NCSA Executive Director 828-695-2520, 24 hours a day to leave a message to cancel your registration for this seminar. There is no fee for cancellations received prior to September 16, 2019, a \$50 administrative fee for cancellations received between September 17 and September 24, 2019, and complete forfeit of registration fees and material for cancellations received after September 25, 2019. No shows will forfeit their entire registration fee and materials. Please call and cancel your registration before the event date to not be considered a No Show.