Estate Planning & Inheritance Tax Strategies Training Course

Professional Development Training Course Outline

Category	Taxation and Revenue	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

Estate Planning & Inheritance Tax Strategies Training Course provides comprehensive insights into how individuals, families, and advisors can effectively plan for the preservation and transfer of wealth across generations. It explores the legal, financial, and tax frameworks that govern estate distribution, inheritance taxation, and asset protection in both domestic and international contexts. Participants will gain a thorough understanding of how to structure wills, trusts, and estates to ensure smooth wealth transitions while minimizing potential tax burdens.

The program focuses on practical strategies to reduce inheritance and estate taxes, maintain compliance with evolving tax regulations, and protect family wealth from unnecessary exposure. It also highlights succession planning considerations, charitable giving structures, and the integration of estate planning with broader financial goals. Designed for tax advisors, legal practitioners, financial planners, and high-net-worth individuals, this course equips participants with the expertise to develop tax-efficient, compliant, and personalized estate planning strategies that support long-term financial stability and family legacy preservation.

Programme Curriculum

Estate Planning & Inheritance Tax Strategies Training Course

Introduction

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Course Objectives

By the end of this training, participants will be able to:

1. Understand the principles and components of estate planning and inheritance tax systems.
2. Identify legal structures for asset protection and intergenerational wealth transfer.
3. Evaluate various inheritance tax mitigation strategies.
4. Analyze the tax implications of wills, trusts, and lifetime gifts.
5. Develop tax-efficient succession and retirement transition plans.
6. Apply double taxation relief principles in cross-border inheritance cases.
7. Interpret and apply inheritance tax laws in different jurisdictions.
8. Advise clients on compliant and optimized estate planning solutions.
9. Utilize valuation methods for estates and gifts.
10. Implement family business succession plans tax-efficiently.
11. Review contemporary reforms and global estate taxation trends.
12. Draft estate planning documents aligned with legal and tax frameworks.
13. Manage estate disputes and inheritance litigation risks.

Target Audience

- Estate planners and wealth managers
- Tax and legal consultants
- Financial advisors and accountants
- Private client advisors
- Family business owners
- High-net-worth individuals
- Executors and trustees
- Compliance and legal officers

Course Duration: 5 days

Course Modules

Module 1: Fundamentals of Estate Planning

- Definition, purpose, and scope of estate planning
- Overview of inheritance tax laws and thresholds
- Types of estate assets and liabilities
- Estate valuation principles
- Legal documentation: wills, trusts, and powers of attorney
- **Case Study:** Estate planning for a blended family scenario

Module 2: Inheritance Tax Systems & Regulations

- Global overview of inheritance and estate taxes
- Exemptions, reliefs, and deductions
- Lifetime transfers vs. transfers upon death
- Inheritance tax computation and reporting
- Tax implications for non-domiciled individuals
- **Case Study:** Comparative analysis of UK vs. EU inheritance tax systems

Module 3: Trusts, Gifts & Asset Protection

- Types of trusts and their tax treatment
- Tax implications of lifetime gifting
- Offshore and onshore trust structures
- Asset protection through family trusts
- Common pitfalls in trust administration
- **Case Study:** Use of discretionary trusts for wealth preservation

Module 4: Business Succession & Wealth Transfer

- Succession planning for family-owned businesses
- Shareholder agreements and tax implications
- Business valuation and capital gains tax considerations
- Transferring business ownership across generations
- Estate equalization strategies for heirs
- **Case Study:** Tax-efficient family business succession model

Module 5: International Estate Planning

- Cross-border inheritance tax issues
- Double taxation treaties and relief mechanisms
- Managing multi-jurisdictional estates
- Tax planning for expatriates and global citizens
- Role of offshore jurisdictions in estate planning
- **Case Study:** Cross-border inheritance of international assets

Module 6: Contemporary Reforms & Emerging Trends

- Global inheritance tax reform initiatives
- Digital assets and cryptocurrency inheritance
- Impact of global mobility on estate taxation
- ESG and philanthropic estate planning
- AI and digital tools in estate administration
- **Case Study:** Adapting estate plans in the digital era

Module 7: Estate Administration & Dispute Resolution

- Estate settlement procedures and executor responsibilities
- Probate processes and tax compliance
- Managing inheritance disputes and litigation
- Ethical and fiduciary duties of estate practitioners
- Mediation and alternative dispute resolution
- **Case Study:** Resolving an inheritance dispute in probate court

Module 8: Estate Tax Planning Strategies

- Structuring estates for tax efficiency
- Integrating insurance and pension planning
- Utilizing tax shelters and exemptions
- Charitable giving and foundations
- Advanced inheritance tax mitigation techniques
- **Case Study:** Designing a comprehensive estate tax strategy

Training Methodology

- Interactive lectures and expert presentations
- Real-world case study analysis
- Group discussions and problem-solving exercises
- Practical simulations and scenario-based learning
- Question-and-answer sessions with tax experts
- Digital tools and estate planning templates

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.com or call *+254769199797*

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to FINESKILL TRAINING CENTER account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
07 Sep 2026	11 Sep 2026	Physical	$1,500

Start Date	End Date	Location	Price
14 Sep 2026	18 Sep 2026	Physical	$1,500
21 Sep 2026	25 Sep 2026	Physical	$1,500
28 Sep 2026	02 Oct 2026	Physical	$1,500
05 Oct 2026	09 Oct 2026	Physical	$1,500
12 Oct 2026	16 Oct 2026	Physical	$1,500
19 Oct 2026	23 Oct 2026	Physical	$1,500
26 Oct 2026	30 Oct 2026	Physical	$1,500

Ready to enroll or request a customized program? Book online or contact us:

Register Online Now

Email: info@fineskilltrainingcenter.com | Website: www.fineskilltrainingcenter.com