Investment Taxation: Capital Gains & Dividends 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

Investment Taxation: Capital Gains & Dividends training course provides participants with a comprehensive understanding of how taxes impact investment returns, capital growth, and dividend income. The course explores key tax principles governing both individual and corporate investment portfolios, including the classification, calculation, and reporting of capital gains and dividend income. Participants will learn how to manage investment structures efficiently, comply with tax obligations, and implement strategies to minimize tax liabilities.

Additionally, the program examines double taxation relief, withholding tax mechanisms, and the impact of international treaties on investment income. Attendees will gain insights into portfolio diversification, timing of disposals, and the treatment of different asset classes under varying tax regimes. By the end of the course, participants will be equipped to make informed, tax-efficient investment decisions in both domestic and global contexts.

Programme Curriculum

Investment Taxation: Capital Gains & Dividends Training Course

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disposals, and the treatment of different asset classes under varying tax regimes. By the end of the course, participants will be equipped to make informed, tax-efficient investment decisions in both domestic and global contexts.

Course Objectives

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

1. Understand the taxation framework for investment income and capital gains.
2. Distinguish between short-term and long-term capital gains taxation.
3. Analyze dividend taxation principles across various jurisdictions.
4. Calculate tax liabilities on asset disposals and reinvestments.
5. Apply double taxation relief and foreign tax credit mechanisms.
6. Evaluate investment holding structures for tax efficiency.
7. Comply with reporting and documentation requirements.
8. Understand withholding tax systems and treaty exemptions.
9. Integrate tax planning into investment decision-making.
10. Assess the impact of tax policy changes on investment strategies.
11. Manage taxation on mutual funds, ETFs, and collective investments.
12. Explore exemptions and deductions applicable to investment income.
13. Implement best practices for sustainable, tax-efficient investment growth.

Target Audience

This course is ideal for:

1. Investors and Wealth Managers
2. Financial Analysts and Advisors
3. Tax Consultants and Accountants
4. Corporate Finance Managers
5. Portfolio and Fund Managers
6. Compliance and Regulatory Officers
7. High Net-Worth Individuals (HNWIs)
8. Legal and Estate Planning Professionals

Course Duration: 5 days

Course Modules

Module 1: Fundamentals of Investment Taxation

- Overview of investment income taxation
- Capital gains vs. income classification
- Dividend taxation principles
- Common legislative frameworks
- Tax implications of investment instruments
- **Case Study:** Comparison of investment tax structures in OECD countries

Module 2: Capital Gains Taxation

- Short-term vs. long-term capital gains
- Asset disposal and gain calculation

- Cost base adjustments and exemptions
- Deferral and rollover reliefs
- Tax-efficient disposal planning
- **Case Study:** Real estate investment and capital gains optimization

Module 3: Dividend Income Taxation

- Gross vs. net dividends
- Withholding tax and gross-up mechanisms
- Dividend imputation and credit systems
- Cross-border dividend taxation
- Exemptions and reliefs for corporate shareholders
- **Case Study:** Dividend tax treatment in cross-border investments

Module 4: Double Taxation Relief & Treaties

- Concept and importance of tax treaties
- OECD Model Tax Convention overview
- Foreign tax credit mechanisms
- Treaty benefits and anti-abuse provisions
- Managing double taxation in global portfolios
- **Case Study:** Application of DTA between the U.S. and the UK

Module 5: Tax Planning for Investment Portfolios

- Portfolio diversification and tax impact
- Timing of asset disposals
- Tax deferral and reinvestment strategies
- Structuring investment entities
- Evaluating offshore vs. onshore investments
- **Case Study:** Tax-efficient investment structuring for multinational investors

Module 6: Corporate Investment Taxation

- Tax treatment of corporate dividends and gains
- Consolidation and group investment structures
- Controlled foreign company (CFC) implications
- Thin capitalization and interest limitation rules
- Profit repatriation and dividend policy strategies
- **Case Study:** Corporate investment planning under BEPS guidelines

Module 7: Reporting, Compliance & Risk Management

- Documentation for capital gains and dividends
- Reporting standards for investors and firms
- FATCA and CRS compliance
- Avoiding tax evasion and penalties
- Internal controls and audit preparedness
- **Case Study:** Tax audit management for investment portfolios

Module 8: Emerging Trends & Future Outlook

- Impact of digital assets and crypto taxation
- ESG and sustainable investment incentives
- Global tax reform and OECD Pillar Two
- Changes in withholding tax policies
- Tax automation and digital reporting tools
- **Case Study:** Emerging market investment taxation trends

Training Methodology

- Interactive lectures and instructor-led discussions
- Real-world case studies and simulations
- Group exercises and scenario analysis
- Practical computation and tax planning workshops
- Q&A sessions and expert insights
- Access to reference materials and 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:

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