Taxation of Trusts & Estates 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

Taxation of Trusts & Estates Training Course provides participants with an in-depth understanding of the complex taxation frameworks governing trusts and estates. This course equips professionals with the expertise to analyze, manage, and apply current tax laws, compliance strategies, and fiduciary responsibilities in estate administration. It combines theoretical knowledge with practical case studies to build proficiency in estate planning, income allocation, and tax reporting for trust entities.

In today's rapidly evolving tax environment, this program emphasizes international taxation, inheritance planning, and fiduciary accounting. Participants will learn to navigate intricate legal requirements, implement risk management solutions, and ensure tax efficiency within estates and trusts. The course integrates real-world tax planning practices, asset protection strategies, and regulatory updates, making it ideal for accountants, financial advisors, and estate managers seeking to expand their tax specialization.

Programme Curriculum

Taxation of Trusts & Estates Training Course

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Course Objectives

1. Understand the core principles and structure of trusts and estates taxation.
2. Identify applicable local and international taxation laws for trusts.
3. Apply tax computation techniques for different categories of trusts and beneficiaries.
4. Evaluate fiduciary responsibilities in tax planning and estate management.
5. Manage compliance with reporting obligations and filing requirements.
6. Analyze tax implications of income distribution and capital gains.
7. Develop effective tax-saving and estate transfer strategies.
8. Interpret complex trust deeds and assess their tax outcomes.
9. Understand estate valuation for inheritance and wealth transfer purposes.
10. Utilize modern tax software and digital compliance tools.
11. Apply double taxation relief principles for cross-border estates.
12. Conduct tax audits and prepare comprehensive estate tax returns.
13. Integrate ethical standards in estate and fiduciary taxation practices.

Organizational Benefits

- Strengthened compliance with evolving tax laws and estate regulations.
- Reduced financial and legal risks through informed tax management.
- Improved organizational trust administration efficiency.
- Enhanced ability to manage high-value client portfolios.
- Increased profitability through optimized estate tax planning.
- Improved audit readiness and record-keeping accuracy.
- Strengthened corporate reputation in tax governance.
- Better staff competency in taxation and fiduciary law.
- Increased client retention through reliable advisory services.
- Enhanced strategic decision-making in wealth management.

Target Audiences

- Tax professionals and consultants
- Estate and trust administrators
- Financial and wealth advisors
- Legal practitioners specializing in estate law
- Accountants and auditors
- Fiduciary officers and trustees
- Banking and investment professionals
- Government and revenue authority officers

Course Duration: 5 days

Course Modules

Module 1: Fundamentals of Trusts and Estates

- Overview of trusts and estate structures
- Types of trusts and their tax characteristics
- Roles and responsibilities of trustees

- Legal framework for estate taxation
- Establishing and administering trusts
- Case Study: Formation of a family trust and its tax implications

Module 2: Taxation Laws and Regulations

- Key national taxation statutes
- Trust income taxation rules
- Estate duty and inheritance tax analysis
- Exemptions and relief provisions
- Recent legal amendments and updates
- Case Study: Tax assessment under new legislation

Module 3: Income Allocation and Distribution

- Principles of income allocation to beneficiaries
- Timing and frequency of distributions
- Tax liabilities on distributed and retained income
- Accounting for discretionary trusts
- Reporting requirements for beneficiaries
- Case Study: Income distribution from a discretionary trust

Module 4: Capital Gains Tax in Estates and Trusts

- Understanding capital gains tax (CGT)
- CGT on disposal of trust assets
- Indexation and rollover relief
- Calculating CGT on inheritance transfers
- CGT compliance documentation
- Case Study: Asset disposal and CGT computation

Module 5: Estate Planning and Tax Efficiency

- Techniques for minimizing estate taxes
- Wealth transfer strategies
- Gifting and exemptions
- Tax implications of estate division
- Life insurance and succession planning
- Case Study: Designing a tax-efficient estate plan

Module 6: Fiduciary Accounting and Compliance

- Trust accounting principles
- Preparation of fiduciary tax returns
- Common compliance errors and penalties
- Audit readiness and financial transparency
- Reporting obligations under FATCA/CRS
- Case Study: Preparing fiduciary accounts for audit review

Module 7: Cross-Border Taxation of Trusts

- International taxation concepts

- Double taxation agreements (DTAs)
- Offshore trusts and reporting obligations
- Tax residency and global estate income
- Transfer pricing implications
- Case Study: Cross-border estate with multiple beneficiaries

Module 8: Ethical and Professional Practices

- Ethical responsibilities of trustees and tax professionals
- Confidentiality and conflict of interest management
- Regulatory compliance in fiduciary practice
- Role of professional conduct in estate taxation
- Governance and accountability standards
- Case Study: Ethical dilemma in estate tax management

Training Methodology

- Instructor-led expert sessions with practical case simulations
- Group discussions and interactive exercises
- Real-world case studies and hands-on problem solving
- Guided workshops using tax calculation tools
- Continuous assessment and feedback through assignments

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
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