Taxation of Trusts, Estates & Succession Planning 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

The complexity of estate planning, trust administration, and succession taxation continues to grow in today's dynamic financial environment. Professionals in the legal, financial, and taxation sectors require advanced knowledge of the regulatory frameworks, tax implications, and strategic planning techniques to optimize wealth transfer and mitigate tax liabilities. **Taxation of Trusts, Estates & Succession Planning Training Course** equips participants with practical insights into trust structures, estate tax planning, and succession strategies to ensure compliance, efficiency, and long-term financial sustainability.

With an emphasis on real-world applications, this training explores contemporary taxation issues, legislative updates, and global best practices. Participants will gain hands-on experience analyzing estate scenarios, structuring trusts, and designing succession plans that align with both client objectives and regulatory requirements. By combining technical knowledge with practical case studies, the course fosters a robust understanding of wealth preservation, tax optimization, and fiduciary responsibilities, preparing professionals to deliver exceptional advisory services.

Programme Curriculum

Taxation of Trusts, Estates & Succession Planning Training Course

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Course Objectives

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

- Understand the fundamental principles of trusts, estates, and succession planning.
- Analyze complex tax regulations affecting trusts and estates.
- Apply estate tax compliance strategies effectively.
- Design trust structures to optimize tax efficiency.
- Evaluate the legal implications of succession planning.
- Implement strategies for minimizing estate taxes and maximizing wealth transfer.
- Interpret recent tax law changes impacting estate and trust planning.
- Assess the impact of cross-border succession and inheritance taxation.
- Develop practical solutions for family wealth preservation.
- Execute proper fiduciary duties and trustee responsibilities.
- Utilize digital tools for tax planning and compliance monitoring.
- Integrate estate planning with overall financial and investment strategies.
- Conduct risk assessment and mitigation in trust and estate administration.

Organizational Benefits

- Enhanced compliance with tax regulations.
- Improved wealth transfer planning efficiency.
- Reduced risks of legal disputes over estates.
- Increased operational knowledge in trust management.
- Better client advisory capabilities.
- Strengthened fiduciary responsibility adherence.
- Optimization of tax liabilities for clients.
- Streamlined cross-border estate planning processes.
- Up-to-date knowledge of legislative changes.

- Improved strategic decision-making in succession planning.

10 Additional Key Learning Outcomes

- Mastery of estate tax calculation techniques.
- Identification of tax-saving opportunities in trusts.
- Ability to create tailored succession strategies for high-net-worth clients.
- Understanding of charitable trusts and philanthropic planning.
- Knowledge of generation-skipping transfer taxes.
- Application of case studies to real-life scenarios.
- Practical insights into trust accounting and reporting.
- Effective management of family-owned business succession.
- Understanding of fiduciary litigation and dispute resolution.
- Integration of tax planning with personal and corporate financial planning.

Target Audiences

- Tax advisors and consultants
- Estate planners and trust officers
- Legal practitioners specializing in inheritance and succession law
- Financial planners and wealth managers
- Accountants and auditors
- Corporate compliance officers
- Family office professionals
- Professionals involved in cross-border estate planning

Course Duration: 5 days

Course Modules

Module 1: Fundamentals of Trusts, Estates, and Succession Planning

- Definition and types of trusts and estates
- Overview of succession planning principles
- Legal and tax implications of trusts
- Key estate planning documents
- Case study: Structuring a family trust for optimal tax outcomes

- Practical application exercises

Module 2: Estate Taxation and Compliance

- Understanding estate tax obligations
- Tax planning strategies for estates
- Compliance and reporting requirements
- Recent legislative changes and updates
- Case study: Estate tax calculation for a high-net-worth individual
- Group discussion and problem-solving exercises

Module 3: Trust Structures and Tax Optimization

- Revocable vs. irrevocable trusts
- Income tax considerations in trusts
- Distribution planning and tax efficiency
- Planning for grantor and non-grantor trusts
- Case study: Designing a trust to minimize tax liabilities
- Hands-on trust structuring workshop

Module 4: Succession Planning for Family Businesses

- Challenges in transferring family businesses
- Tax-efficient succession strategies
- Shareholder agreements and governance structures
- Valuation methods and estate freezes
- Case study: Succession planning for a multi-generational business
- Scenario-based exercises

Module 5: Cross-Border Estate and Inheritance Tax

- International estate taxation principles
- Double taxation agreements and reliefs
- Planning strategies for expatriates and foreign assets
- Compliance in cross-border succession
- Case study: Cross-border inheritance planning for dual citizens
- Group problem-solving exercises

Module 6: Charitable Trusts and Philanthropic Planning

- Overview of charitable trusts
- Tax benefits of charitable giving
- Structuring philanthropic strategies
- Integration with overall estate planning
- Case study: Establishing a charitable remainder trust
- Practical exercise in drafting a charitable plan

Module 7: Risk Management and Fiduciary Duties

- Trustee responsibilities and liabilities
- Risk assessment in estate and trust management
- Mitigating conflicts of interest
- Handling disputes and litigation
- Case study: Resolving fiduciary disputes
- Role-play and interactive exercises

Module 8: Digital Tools and Future Trends in Estate Planning

- Technology for trust administration
- Digital compliance tools
- Emerging trends in succession planning
- Automation in estate tax reporting
- Case study: Using software for estate tax projections
- Hands-on demonstration and practice

Training Methodology

- Interactive lectures with real-world examples
- Hands-on exercises and workshops
- Case study analysis for practical insights
- Group discussions and scenario-based learning
- Role-playing exercises to simulate client interactions
- Digital tool demonstrations for estate and trust management

Register as a group from 3 participants for a Discount

Send us an email: **info@fineskilltrainingcenter.org** **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
21 Sep 2026	25 Sep 2026	Online	$1,000
21 Sep 2026	25 Sep 2026	Physical	$1,500
21 Sep 2026	25 Sep 2026	Physical	$0
21 Sep 2026	25 Sep 2026	Physical	$0
21 Sep 2026	25 Sep 2026	Physical	$0
21 Sep 2026	25 Sep 2026	Physical	$0
21 Sep 2026	25 Sep 2026	Physical	$0
21 Sep 2026	25 Sep 2026	Physical	$0

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