



NORTH COUNTY CHAPTER FALL WORKSHOPS 2010

Westfield Shopping Center
272 E. Via Rancho Pkwy, Escondido – 2nd Floor, Community Room

Session 2: The Income Taxation of Trusts and Estates: Sat. 10/2/10, 8:30am – 5:30pm (8 hr Fed)

This is a basic course in the taxation of trusts and estates using form 1041. It analyzes the basic concepts underlying a fiduciary entity as well as the substantive tax provisions of Subchapter J and related sections of the Internal Revenue Code. The course utilizes a spreadsheet approach to organize information in order to perform the various calculations necessary to determine taxation to the entity and/or the beneficiaries.



Jacqueline A. Patterson,
J.D., M.B.T., CPA

Jacqueline Patterson is a founding partner in the law firm of Haney, Buchanan, & Patterson, LLP. She specializes in tax, estate, & financial transactions. Her emphasis is positioning individuals, businesses, & fiduciary entities for asset protection and succession planning. She advises grantors, fiduciaries, and beneficiaries in matters involving transfer, administration, investment, & management of assets. She is a consultant to attorneys and CPAs in fiduciary accounting, taxation, and litigation.

Ms. Patterson is a nationally recognized speaker and has been a seminar discussion leader and author for over 15 years. Teaching is an important role in her professional career. She has held faculty positions at USC and Golden Gate University. She is currently serving on an AICPA special task force studying fiduciary planning & has previously served on the Estate and Gift Technical Resource Panel for several years. She taught for the National Tax Institute and has been a seminar discussion leader for the California CPA Education Foundation for over 10 years. She was honored by the California CPA Education Foundation with the 2000 Award for Meritorious Service, the 2002 Award for Outstanding Course Materials, and the 2006 Award for Outstanding Conference Speaker.

Her memberships include:

State Bar of California

California Board of Accountancy

AICPA

Los Angeles Bar Association

Beverly Hills Estate Planning Council

Women Lawyers of Los Angeles