

**5227 TAX SYSTEM, INC & TEMO A. ARJANI & Co., LLP**

**SEMINAR**

**EXPLORING THE TAX INTRICACIES OF CHARITABLE REMAINDER TRUSTS**

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**DATE:** November 10, 2008

**Place:** The Pasadena Hilton Hotel  
150 South Los Robles Ave.  
Pasadena, CA 91101

**TIME:** 8:30 a.m. to 5 p.m.

**PRESENTED BY:**

**5227 TAX SYSTEM, INC. AND TEMO A. ARJANI & Co., LLP**

This seminar is planned to provide insight into issues that arise during preparation of tax returns of Charitable Remainder Trusts. It will also cover tax planning, recent rulings, proposed regulations, recent legislation, other tax developments and tax strategies that can benefit donors and are important to both, planned giving professionals and tax return preparers.

The new Form 5227 and UBTI rules will be reviewed.

Continuing professional education credit (8 hours) will be available.

**REGISTRATION:**

Early Bird Registration (\$270) ends September 30, 2008. Registration after this date is \$310. Your registration fee will cover a continental breakfast (7:45 a.m. to 8:30 a.m.) and lunch. Parking will be validated.

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**REGISTRATION FORM**

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Organization: \_\_\_\_\_

Street Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_

**E-Mail to:** NNelson@Arjani.com

**Mail to:** 5227 Tax System, Inc.  
301 E. Colorado Blvd., Suite 426  
Pasadena, CA 91101

If you have any questions, please call us at (626) 578-1978 or Fax (626) 578-1639

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**Exploring the Tax Intricacies of Charitable Remainder Trusts**

Hilton Hotel

November 10, 2008

**AGENDA**

Introduction to Charitable Remainder Trusts (CRTs)

Types of CRTs

The 4-Tier Tax System

Trust Accounting Income

Tax Planning with NIMCRUTs

Federal vs. State Differences

Preparation of Tax Forms

Procedural Tax Matters

New Form 5227 and UBTI Rules

Other Recent Developments

5227 Tax System