ESTATE PLANNING COUNCIL OF LONG ISLAND

NOVEMBER 2026

NAEPC Council of Excellence

MEETING NOTICE

JOIN US FOR OUR DINNER MEETING

View Speaker Materials | Bio

Fiduciary Income Tax (1041s)

The basics, important elections, common mistakes, audit issues, coordinating the timing with other tax returns



OUR SPEAKER

Matthew Taus, CPA/PFS, CFP®, AEP® - Wild, Maney & Resnick LLP

As chair of the Private Client Service Practice Group and Partner overseeing his firm's Trust, Estate, and Gift Tax practice, Matthew advises high-net-worth families, real estate professionals, and closely held business owners on a broad range of tax matters including the areas of investment taxation, equity compensation, foreign investments in the U.S., estate planning, fiduciary income tax matters, entity structuring, rental real estate, multi-state taxation, and business sales.

WHEN
Thursday, November 19
5:30-6:30pm Cocktails
6:30-8:00pm Dinner & Program

WHERE
Volpe at the Fox Hollow
7725 Jericho Tpke.
Woodbury, NY 11797

$ ADMISSION
No Cost For Members
in good standing
Guests: $75

CLICK HERE TO RSVP
Online by November 16th

Thank you to our CLE facilitator, Rivkin Radler!

LEARNING OBJECTIVES

Identify common taxation attributes of trust and estates. Understand and apply fiduciary income tax planning strategies. Understand the interaction between the final individual tax return, fiduciary income tax return, and estate tax return

ACCREDITATION
Sponsored by **Rivkin Radler, LLP**
NYS CLE Accreditation Provider
Sponsor ID **002917**

CPE & CLE CREDITS
CPE: 1 Credit – Taxation Services
CLE: 1 Credit – Professional Practice
Intended for Experienced Attorneys Only

DETAILS
Teaching Method: Live
Level of Knowledge: Intermediate
No Pre-requisites or Advanced Preparation

Visit the NAEPC website for valuable council resources, including the latest issue of the Journal of Estate and Tax Planning.

VISIT NAEPC SITE

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