



Ken Jefferson Presents to the ABA on Audit Risk for Estate and Gift Tax Returns

PRACTICE AREAS

Estate Planning

Gift & Estate Tax Planning

IRS Appeals Proceedings

IRS Audit Defense

Tax Controversies

Tax Litigation

March 19, 2021

IPB estate planning associate Ken Jefferson presented "The 2020 Gift that Keeps on Giving - Tips and Best Practices to Manage IRS Audit Risk in 2021," along with Venable's Chelsea McGrath, to the ABA's Real Property, Trust and Estate Law Section (RPTE), on Wednesday March 17th as part of the monthly group and committee conference call series.

The presentation covered an overview of the audit process, audit letters and IDRs, the appeals process and/or litigation, classification of issues and return selection, case study and practice tips, and a discussion of adequate disclosure.