Estates, Gifts and Trusts Portfolios Library

In-depth analysis of key issues necessary for developing and implementing the best estate, gift, and related income tax strategies.

Written by leading practitioners in the field, the ***Estates, Gifts and Trusts Portfolios*** provide everything necessary to research, plan, and implement strategies for maximizing your clients' control and minimizing taxes and estate management costs.

Expert Analysis

More than 80 Portfolios offer clear, in-depth guidance you can follow with confidence as you address issues of estate and wealth management. Portfolio topics include:

- Charitable Contributions
- Estate Planning/Business Planning
- Estate Tax
- Gifts
- Income Tax
- Exempt Organizations/Private Foundations
- Post-Mortem Planning
- Trusts
- Valuation

Practice Tools

Time-saving aids developed in today's best real-world practices, and ready for your staff to use:

- Federal Tax Calendar
- Federal Tax Forms
- Tables, Charts and Lists
- Working Papers
  (sample plans, documents, and more)
- State Tax Forms*

Source Documents

Laws and Regulations

- Internal Revenue Code
- Treasury Regulations
- Proposed Regulations
- Tax Legislation
- State Tax Statutes and Regulations*

Agency Documents

- Treasury Decision Preambles
- IRS Documents
- IRS Publications
- Circular 230
- CIPs/ISP Papers

Cases

- Federal Tax Cases
- Tax Court Rules
- Court of Federal Claims Rules
- State Supreme Court Cases*

News and Commentary

Stay alert to how estate, gift and trust developments create new issues for you and your clients. Your Library includes these timely reports:

- Daily Tax Report Highlights
- Tax Management Memorandum
- Estates, Gifts and Trusts Journal
- Weekly Report
- Insights & Commentary
- Compensation Planning Journal*
- Financial Planning Journal*
- Real Estate Journal*

* Optional

FORMATS

WEB PRINT