Bloomberg BNA Tax & Accounting

Estates, Gifts & Trusts

The most practitioner-focused estates, gifts and trusts tax news, analysis and practice tools available.
Bloomberg BNA Tax & Accounting

Estates, Gifts & Trusts

Bloomberg BNA Tax & Accounting’s Estates, Gifts & Trusts brings together in-depth analysis on more than 100 estate planning topics, commentary on emerging estate planning trends and ongoing discussions with leading experts on estate planning issues that affect you.

Expert analysis
Exclusive access to Tax Management Portfolios™ and Bloomberg BNA’s renowned BNA Insight articles, written by the leading estate tax practitioners, provides in-depth analysis and unparalleled guidance enabling you to determine the most effective strategies to maximize your clients’ control and minimize taxes and estate management costs.

The Estates, Gifts & Trusts Portfolios cover:
• Charitable Contributions
• Estate Planning/Business Planning
• Estate Tax
• Exempt Organizations/Private Foundations
• Family Limited Partnerships
• Generation-Skipping Tax
• Gifts
• Income Tax
• Life Insurance
• Post-Mortem Planning
• Trusts
• Valuation

Other analysis includes:
• Fast Answers: Income, Estates and Gift Taxation
• Tax Practice Series™

Practice tools
Time-saving practice aids include:
• Client Letters
• Election Statements
• Federal Tax Forms
• State Tax Forms
• Tables, Charts and Lists
• Tax Calculators
• Trust Nexus Tool
• Working Papers (sample plans, documents, and more)

State Coverage
• Estates, Gifts and Trusts Navigator
• Estates, Gifts and Trusts Chart Builder
• State Tax Cases
• Statutes
• Regulations
• State Tax
• Nexus Tool

Source documents
You’ll find only the most accurate, official sources cited here:

Laws & Regulations
• Internal Revenue Code (current & archive)
• Proposed Regulations
• Tax Legislation
• Treasury Regulations

Agency Documents
• IRS Documents
• IRS Publications
• Treasury Decision Preambles

Cases
• Court of Federal Claims Rules
• Federal Tax Cases
• Tax Court Rules

News & Journals
• BNA Insights (Federal)
• Compensation Planning Journal™
• Daily Tax Report® Highlights
• Estates, Gifts & Trusts Journal
• Financial Planning Journal
• IRS Practice Adviser Report™
• Real Estate Journal
• Tax Management Memorandum™
• Tax Management Weekly Report™

“Bloomberg BNA’s Estate, Gifts and Trusts Portfolios give our trust administrators and wealth transfer design professionals a comprehensive source for expert analysis in an easy-to-use format they can access virtually anywhere.”
— Jacob W. Schaffer, Vice President of Trust Services, Fremont National Bank and Trust Company
For practitioners, by practitioners.

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

**Estates, Gifts & Trusts Analysis by State (Navigator)**

Get detailed state-by-state coverage of each state’s estates, gifts and trusts tax law, including computation of tax, treatment of nonresidents, forms and other administrative requirements, and much more.

**Estates, Gifts & Trusts Journal**

This bimonthly review gives you an ongoing perspective on today’s many estate planning topics, such as marital deduction planning, estate and trust administration, charitable gifts and valuation. It features articles and commentary by leading practitioners along with updates on trends and techniques, and reviews of pertinent publications.
Bloomberg BNA is the gold standard for in-depth research and analysis. Working with a network of over 1,000 leading outside practitioners with deep expertise in their given areas, Bloomberg BNA serves:

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