Estates, Gifts & Trusts

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

Estates, Gifts & Trusts

Bloomberg Tax’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 Tax’s renowned BNA Insights articles, written by leading estate tax practitioners. These resources provide 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
Timesaving practice aids include:
- Client Letters
- Elections & Compliance 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 Chart Builder
- Estates, Gifts and Trusts Navigator
- Nexus Tool
- Regulations
- State Tax
- State Tax Cases
- Statutes

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

Laws & Regulations
- Internal Revenue Code (current and 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 and journals
- BNA Insights (Federal)
- Compensation Planning Journal
- Daily Tax Report® Highlights
- Estates, Gifts & Trusts Journal
- IRS Practice Adviser Report
- Real Estate Journal
- Tax Management Memorandum
- Tax Management Weekly Report™

“Estates, 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, updates on trends and techniques, and reviews of pertinent publications.
“Bloomberg Tax’s Estates, Gifts and Trusts is an essential part of my estate tax practice. The coverage is broader than any other available treatise.”
— Robert Adams, Partner, Adams & Cramer

Todd Angkatavanich, Ernst & Young
David Stein, Withers Bergman LLP
Co-Authors, Wealth Planning With Hedge Fund and Private Equity Fund Interests and Related IRC Section 2701 Issues (Portfolio 875-1st)

Carol Harrington
McDermott Will & Emery Private Client Practice
Author, Generation-Skipping Transfer Tax (Portfolio 850-2nd)

To learn more, contact your local representative, call 800.372.1033, or visit www.bna.com/estatetax