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estate planners, *Tax Planning for Family Wealth Transfers at Death: Analysis with Forms*. This WG&L treatise, by Howard M. Zaritsky, renowned estate planner and author...

Isaac M. O'Bannon • Sep. 18, 2014



Thomson Reuters has released a new multi-volume WG&L Estate Series treatise for estate planners, *Tax Planning for Family Wealth Transfers at Death: Analysis with Forms*. This WG&L treatise, by Howard M. Zaritsky, renowned estate planner and author, is part of the Thomson Reuters Checkpoint portfolio of advanced knowledge solutions for tax and accounting professionals.

The treatise provides detailed discussion and analysis of the special income, estate,

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“Not everyone is willing to make lifetime gifts, so planning for lifetime transfers may not be useful. Planning for transfers at death, however, is always necessary, especially for those with sufficient assets to have tax exposure,” said Howard M. Zaritsky, author of the treatise and nationally-recognized expert on estate, gift, and generation-skipping transfer taxes, as well as fiduciary income taxes, estate planning, and estate administration.

Tax Planning for Family Wealth Transfers at Death: Analysis with Forms provides in-depth guidance on such matters as:

- Planning and drafting wills and revocable trusts to implement marital deduction and generation-skipping transfer tax planning.
- Determining when and how best to use portability of a deceased spouse's unused exemption amount.
- Structuring the most appropriate forms of joint property ownership to leverage the many benefits of common ownership.

This treatise is available for purchase at tax.thomsonreuters.com/store.

Thomson Reuters offers many resources to help estate planners navigate these complex rules and requirements, including the following:

- *Tax Planning for Family Wealth Transfers During Life: Analysis with Forms* — This white paper discusses the various ways that *lifetime* transfers can reduce a family's income, estate, gift, and generation-skipping transfer taxes.
- *Zaritsky on Tenancy by the Entireties Joint Revocable Trusts* — This special report discusses how, in states that permit the ownership of property as tenants by the entirety, the significant creditor protection benefits afforded such ownership can be extended to property owned in trust. Eight states already authorize this by

statute, and a case from the Supreme Court in another state suggests that it may be

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