IntelliConnect™

Financial and Estate Planning Library

Get complete coverage of financial issues affecting estate planning in one up-to-date, authoritative resource.

In-Depth Coverage • Expert Analysis • Productivity Tools • Practice Aids • Automated Calculations

The Financial and Estate Planning Library provides all of the information you need to effectively plan estates in one easy-to-use online resource. The Library offers a unique combination of the text of the federal estate, gift, and generation-skipping tax law, explanations of that law, and examples of how to apply the law in real world situations.

COMPREHENSIVE AND AUTHORITATIVE CONTENT

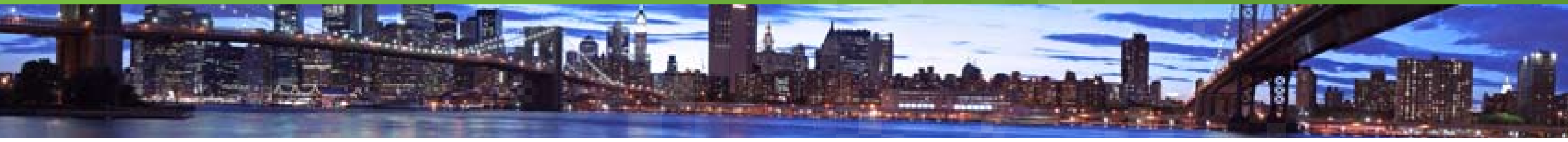
- Federal Estate & Gift Tax Reporter — in-depth analysis related to federal estate, gift and generation-skipping tax law (Updated Weekly)
- Financial and Estate Planning — coverage of all stages of the estate plan, from development to administration
- *U.S. Master™ Estate and Gift Tax Guide* — quick, concise answers to federal and estate gift tax questions
- Internal Revenue Code — full text of the current Internal Revenue Code, including comprehensive CCH code-amendment notes
- Federal Tax Regulations — full, official text of Treasury Department interpretations of the Internal Revenue Code, including final, temporary and proposed regulations
- IRS Estate Tax and Valuation Publications — narrative insight and guidance from the IRS' viewpoint, including IRS Pubs. 448, 904, 950, 1457, 1458 and 1459
- IRS Actuarial Factors
- Rulings and Other Documents
- Letter Rulings and IRS Positions
- Tax Court and Federal Tax Cases

NEWS AND UPDATES

- *Tax Tracker News™* — customized daily news delivered via email and a personalized web page
- *Estate Planning Review* — monthly newsletter covering financial and estate planning trends and techniques to comply with the law
- *Federal Estate and Gift Tax Report Letter* — highlights of current developments relating to federal estate, gift, and generation-skipping laws (Updated Weekly)
- *Financial and Estate Planning Ideas and Trends Newsletter* — summaries and expert commentary on key developments in financial and estate planning

PRODUCTIVITY TOOLS

- *perform plus III™* — selected interactive federal and state tax forms and instructions relating to financial and estate planning
- *CCH® FinEst Calcs™* — automated and consolidated financial and estate planning calculations, including graphical representation
- *Estate Planning Client Letter Toolkit™* — sample letters to send to clients for various types of client and estate planning issues
- *Estate Planning Election and Compliance Toolkit™* — coverage of more than 730 tax elections, with filing requirements for each election
- *Smart Charts™*
  - Multistate Transfer Tax Laws
  - Multistate Transfer Tax Rates
  - Multistate Transfer Tax Penalties
  - Selected Federal Rates for Estate and Charitable Planning



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Financial and Estate Planning Library,
please contact your CCH Account Representative
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