CCH
a Wolters Kluwer business

IntelliConnect®

Wealth Planning Advisor

Get fast, reliable answers to your wealth and tax planning questions with this complete resource.

Current Articles • Explanations • Practice Tools • Primary Source Materials • Daily Tax News

Wealth Planning Advisor is an award-winning resource for professionals offering wealth and tax planning advice to their clients. Organized by topic, Wealth Planning Advisor covers the following:

- Investment Planning
- Individual Tax and Business Planning
- Executive Compensation
- Retirement Planning
- Transfer Tax and Post-Mortem Planning
- Asset Protection
- Life Insurance

Tools

- Sample financial and estate planning forms, checklists, questionnaires, client memoranda, tables, charts and worksheets guide you through your planning and make you more efficient
- Over 100 quick calculators, including financial, investment, retirement, insurance, tax, savings, personal finance, and business calculators
- CCH® FinEst Calcs™ — gives you more than 20 calculators to automate and consolidate estate planning information and provide graphical representation
- *Smart Charts*™ — customized charts that you create from a selected list of topics to locate multi-state planning information
- *Client Letter Toolkit* — makes communicating with your clients quick and easy
- *Election and Compliance Toolkit* — prepares ready-to-file election and compliance statements on tax planning related topics
- *Depreciation Toolkit* — helps you quickly create a depreciation schedule for any business asset and provides information on depreciation options
- *Federal Sales Tax Deduction Toolkit* — calculates new sales tax deductions by the taxpayer's state and compares them to the actual receipt method
- *Federal Withholding Calculator* — automates and consolidates federal withholding calculations
- *IRA Comparison Toolkit* — compares the results of investing in traditional IRAs, both deductible and nondeductible, and a Roth IRA
- *Savings Bond Lookup* — allows you to calculate how much your bonds are worth, how much interest they have accrued as of a given redemption date, and the date in which the bonds mature

Answer Books

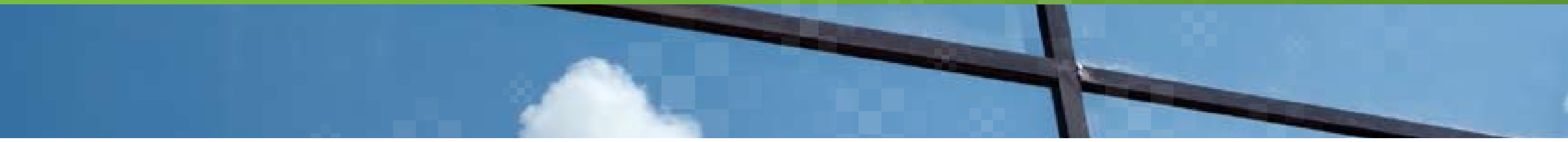
- *Individual Tax Answer Book*
- *Executive Compensation Answer Book*
- *Nonqualified Deferred Compensation Answer Book*
- *Individual Retirement Account Answer Book*
- *Qualified Domestic Relations Order Answer Book*
- *Roth IRA Answer Book*
- *Estate and Retirement Planning Answer Book*
- *Financial Planning Answer Book*
- *Investment Planning Answer Book*

Current News and Trends

- *Tax Tracker News*™ — this customized daily news service is delivered to you via email or your own personalized news web page
- *BNA Financial Planning Journal* — a monthly publication that reviews issues that affect how you advise your clients
- Planning Articles — stay up-to-date with articles on investment planning, individual tax planning, executive compensation, retirement planning, transfer tax/post-mortem planning, asset protection and life insurance
- CCH Tax Briefings

Primary Source Material

- Internal Revenue Code and Regulations
- IRS Publications
- U.S. Tax Cases and Tax Court Cases
- Letter Rulings & IRS Positions
- Rulings and Other Documents



Organized by Topic, Covering Seven Areas of Concentration

Investment Planning

- Basics of Wealth Management
- Income Tax Planning
- Investment Planning
- Retirement Planning and Risk Management
- Estate Planning
- Special Planning Situations

Individual Tax Planning

- Tax Planning for Children
- Tax Planning for Losing and Finding a Job
- Planning for Selected Divorce-Related Topics
- Tax-Wise Ways of Handling Medical Expenses
- Selling a Home
- Taking Advantage of Incentives for Higher Education
- Disabled Individuals
- Certain Investment Products
- Using Life Insurance Trusts
- Sophisticated Charitable Giving
- Tax Implications of Complying with Federal Employment Laws
- Mid-Year and Year-end Tax Planning
- Valuation Issues
- Alternative Minimum Tax Planning
- Family Strategies
- Estimated Tax
- Business Planning
- Tax Strategies for the Self-Employed
- International Tax Planning

Executive Compensation

- Executive Employment Agreements
- Change in Control Agreements
- Consulting Agreements
- Noncompetes and Other Restrictive Covenants
- Retention and Compensation of Outside Board Members
- Stock Incentive Plan Design and Issues
- Stock Options
- Restricted Stock, Performance Shares and RSUs
- Phantom Stock and Stock Appreciation Rights
- Employee Stock Purchase Plans
- Company Loans to Executives
- Securities Law Compliance Issues Relating to Executive Compensation Plans
- Other Stock Option Plan Issues
- Nonequity-Based Incentive Compensation
- Qualified Retirement Plans
- Nonqualified Retirement and Deferred Compensation
- Split-Dollar Life Insurance Arrangements
- Health and Welfare Benefit Plans
- Executive Compensation Litigation

Retirement Planning

- Types of IRAs
- Operation and Administration of IRAs
- Distributions
- Retirement Plans in Divorce
- Discovery of Retirement Benefits
- How Retirement Plans Are Valued
- Calculating the Lump-Sum Present Value
- Valuing Federal, Military and Railroad Retirement
- An Introduction to QDROs and Related Court Orders
- Effectively Drafting the QDRO
- Dividing Other Non-ERISA Retirement Plans and IRAs
- Retirement Plan Distributions and Rollover Options
- Qualified Medical Child Support Orders

Transfer Tax and Post-Mortem Planning

- Federal Gift Tax
- Gift Tax Return
- Federal Estate Tax
- Estate Tax Return
- Generation Skipping Transfer Tax
- Decedent's final Income Tax Return
- Income Taxation of Trusts and Estates

Asset Protection

- Fraudulent Conveyance
- Choice of Business Entity
- Domestic Trusts
- Foreign Trusts
- Forms of Ownership
- Exempt Property
- Foreign Bank Accounts

Life Insurance

- Life Insurance Products Defined
- Determining Life Insurance Needs
- Term Life Insurance Products
- Whole Life Insurance Products
- Universal Life Insurance Products
- Fixed-Premium Variable Life Insurance Products
- Variable Universal Life Insurance Products
- Financial Analysis of Life Insurance
- Choosing Among Investment Types of Life Insurance
- Life Insurance Riders
- Managing Life Insurance

Training and Consulting Options to Fit Your Needs

CCH also offers valuable training, consulting and CPE to keep you ahead of the curve. From live training and consulting, to on-demand online learning, CCH provides the tools that everyone, from new hires to seasoned pros, needs to strengthen their abilities. Visit **CCHGroup.com/Training** to learn more.

To learn more about Wealth Planning Advisor,
please contact your CCH Account Representative at
888-CCH-REPS (888-224-7377)
or visit **CCHGroup.com**

Join us on at **CCHGroup.com/Social**

CCH
a Wolters Kluwer business

4025 W. Peterson Avenue
Chicago, IL 60646-6085
888-CCH-REPS
CCHGroup.com

ACS 90091137 4/10

206029RSH