



IntelliConnect™ Estate Planning Expert Library™

Improve productivity in all areas of your practice
with this exclusive resource.

Leading Estate Planning Treatises • Expert Analysis • Primary Source Material • Practice Tools • Daily Tax News

The Estate Planning Expert Library™ is an exclusive estate planning resource that will assist you in all areas of your practice — from client counseling, research and planning, to drafting and compliance. It is organized into four modules.

ESTATE PLANNING AND DRAFTING

- *Estate Planning*, by A. James Casner and Jeffrey N. Pennell — encyclopedic coverage of estate planning practice
- *Price on Contemporary Estate Planning*, by John R. Price and Samuel A. Donaldson — a core resource and reference tool covering the principal tenets of estate planning
- *Drafting the Estate Plan: Law and Forms*, by David A. Handler and Deborah V. Dunn — covers transfer tax and trust laws and examines the pitfalls and planning opportunities presented by the law
- *Multistate and Multinational Estate Planning*, by Jeffrey A. Schoenblum — explores the legal aspects of individual wealth transfers across state and national boundaries

CHARITABLE PLANNING

- *Taxwise Giving* — Conrad Teitell's monthly newsletter on philanthropic topics, as well as tax law changes, planning techniques and tips
- *Outright Charitable Gifts*, by Conrad Teitell — comprehensive coverage on outright charitable gifts, including tax and reporting compliance rules for individuals, partnerships and corporations
- *Deferred Giving*, by Conrad Teitell — covers the income, gift, estate and capital gains tax implications of deferred giving techniques
- *Charitable Lead Trusts*, by Conrad Teitell — definitive explanation of charitable lead trusts and unitrusts, including sample trust agreements and forms
- *Planned Giving*, by Conrad Teitell — practice-oriented explanations of the tax rules for outright and deferred giving

TRUST AND ESTATE ADMINISTRATION

- *Income Taxation of Fiduciaries & Beneficiaries*, by Byrle Abbin — practice-focused discussion of the state law trust accounting rules and the federal income taxation of trusts and estates
- *Federal Income Taxation of Estates, Trusts & Beneficiaries*, by M. Carr Ferguson, James J. Freeland and Mark L. Ascher — step-by-step guidance for preparing the decedent's final return, characterization of income in respect of a decedent, and computation of distributable net income (DNI)
- *Loring: A Trustee's Handbook*, edited by Charles E. Rounds, Jr. — the most convenient, reliable and complete source for trust advice

ELDER LAW PLANNING

- *ElderLaw Report*, edited by Harry S. Margolis and Kenneth M. Coughlin — a monthly newsletter that keeps elder law planning professionals current on the trends and issues affecting senior clients
- *ElderLaw Portfolio Series*, edited by Harry S. Margolis and G. Thomas Bickford — leading elder law experts tell you what you need to know to meet the challenges of the evolving elder law practice
- *ElderLaw Forms Manual*, by Harry S. Margolis — practice-tested forms assist you in the representation of older clients and cover such areas as managing the elder law practice, estate and long-term care planning advice, and more

All modules include:

SUPERIOR CONTENT AND EXPERT GUIDANCE

- Analytical content — ensures you have the right answers to your estate planning questions
- Guidance in key practice areas — assists you with client counseling, research, planning, drafting and compliance
- Complete primary source materials — including the Internal Revenue Code, Federal Tax Regulations, Cases, and Rulings and IRS Pubs. 448, 904, 950, 1457, 1458 and 1459

CURRENT NEWS AND TRENDS

- *Tax Tracker News*™ — our customizable news service, delivered daily via email and your own personalized web page
- *Practitioner's Strategies* — columns written by noted estate planning practitioners on hot topics and emerging trends
- *Estate Planning Review* — a monthly newsletter covering financial and estate planning trends and techniques to comply with the law

PRACTICE TOOLS AND AIDS

- *CCH® FinEst Calcs*™ — automates and consolidates financial and estate planning calculations and provides graphical representation — in one product
- *Smart Charts*™ — by selecting a list of topics, you can create a custom chart on various multistate issues, such as asset protection, estate administration and more

- *Key Tax Rate Data* — includes federal tables, rates and credits, and transfer tax compendiums for all 50 states and the District of Columbia
- *Estate Planning Client Letter Toolkit*™ — letters and correspondence on estate planning topics and other issues related to transfer taxes
- *Estate Planning Election and Compliance Toolkit*™ — prepares ready-to-file election and compliance statements on estate planning and related topics
- *Multistate Guide to Estate Planning* by Jeffrey A. Schoenblum — provides quick reference to the complex state rules governing various estate planning issues in easy-to-use chart format
- *Teitell's Portable Planned Giving Manual*, by Conrad Teitell — covers all aspects of charitable giving, including sample documents and practice aids
- *IRS Actuarial Factors*™ — instantly locates and returns the actuarial information you need
- *perform plus III*® — access to interactive federal and state estate and gift tax forms and instructions

To learn more about
Estate Planning Expert Library,
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