CCH
a Wolters Kluwer business

■ TAX RESEARCH NETWORK™

Get fast answers for wealth management tax and planning questions – plus practice tools, daily tax news and coverage of current issues and trends.

Accounting & Audit
Federal Tax
State Tax
Financial & Estate Planning
Wealth Management
Practice Areas
International Tax
Integrated Productivity Tools

Wealth Management Library

A complete resource for wealth management planning

The Wealth Management Library on Tax Research NetWork™ is an award-winning resource for professionals offering wealth management planning advice to their clients. The Wealth Management Library includes the following topic modules:

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

PRACTICE AIDS & TOOLS

- Sample financial and estate planning forms, checklists, tables, charts and worksheets guide you through your planning.
- A *Client Letter Toolkit* makes communicating with your clients quick and easy.
- *FinEst Calcs*™ – More than 20 calculators automate and consolidate financial and estate planning information and provide graphical representation.
- An *Election and Compliance Toolkit* prepares ready-to-file election and compliance statements on tax planning related topics.
- *Multistate Asset Protection Smart Charts*™– By selecting a list of topics, you can create a custom chart that allows you to locate multistate asset protection information.
- Answer Books — Includes *Executive Compensation Answer Book, Nonqualified Deferred Compensation Answer Book, Individual Retirement Account Answer Book, Qualified Domestic Relations Answer Book, Roth IRA Answer Book, Estate and Retirement Planning Answer Book*, and *Financial Planning Answer Book.*

CURRENT NEWS & TRENDS

The Wealth Management Library contains a variety of news services and publications to help keep you up-to-date.

- *Tax Tracker News*™: Our customized daily news service is delivered to you via email or your own personalized news web page.
- Planning Articles: Stay up-to-date with articles relating to the hottest issues in wealth management. Includes articles from *TAXES — the Tax Magazine*®, the *Journal of Retirement Planning*, the *Journal of Practical Estate Planning,* and more.
- CCH Tax Briefings keep you current on recent tax legislation by providing summaries of law changes.
- *BNA Financial Planning Journal:* This monthly journal provides a review of issues that affect how you advise your clients. It includes coverage of domestic and global economic trends, income tax planning, Social Security and Medicare, investment planning, retirement planning and insurance planning.

PRIMARY SOURCE MATERIAL

- The Wealth Management Library includes Internal Revenue Code and Regulations, IRS Publications, U. S. Tax Cases and Tax Court Cases, Letter Rulings & IRS Positions, and Rulings and Other Documents.

INTEGRATION

- CCH@Hand™ – A revolutionary research tool that allows you to look up tax answers, check citations, and even copy research information into your emails and Microsoft® Office documents – all without interrupting your workflow.

SEARCH AIDS

- *Tax Thesaurus* – Ensures you locate all the relevant documents – without the need to enter all the possible tax terms separately. It finds singular and plurals automatically, too.

WEALTH MANAGEMENT LIBRARY

Organized by topic, the Wealth Management Library subscription covers seven areas of concentration. Customize the package that's right for you.

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

To learn more about Wealth Management Library on Tax Research NetWork, please contact your CCH Account Representative at 1-888-CCH-REPS (1-888-224-7377) or visit CCHGroup.com

CCH
a Wolters Kluwer business

4025 W. Peterson Avenue
Chicago, IL 60646-6085
1-888-CCH-REPS
CCHGroup.com