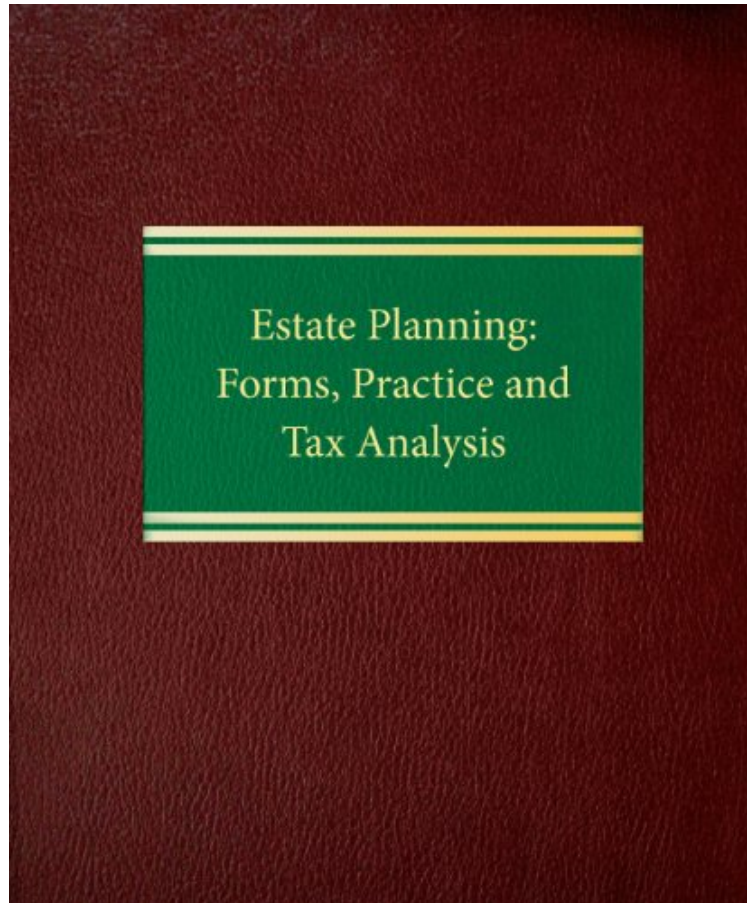


## Estate Planning: Forms, Practice and Tax Analysis

*Gerald S. Susman*

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Estate Planning introduces the tax planner to unique wealth transfer and asset protection strategies. It provides the practitioner with a model succession plan to assist the next generation in receiving both business and nonbusiness assets with the lowest possible tax cost. Estate Planning includes discussions of: the use of wills; living trusts; gifts in trust; insurance trusts; estate and gift tax returns; gifts of purchases of stock; financial planning for retirement and the use of traditional and Roth IRAs; family estate plans; discount valuation of intra-family gifts of a minority interest in a closely held family business context; LLCs; like-kind exchanges; and the use of charitable transfers. It will guide you through the possible reversion of the estate, gift and generation-skipping taxes to pre-2001 levels at the end of 2012, and the far-reaching effects of EGTRRA 2001, JGTRRA 2003, TIPRA, the Pension Protection Act of 2006, and the Tax Relief Act of 2010. The book looks at strategies to help estate- and gift-plan a business, enable designees to

preserve, continue, and grow the business, and provide for the owner or spouse using such tools as Family Limited Partnerships (FLPs) and Business Continuity Living Trusts. It also provides many easy-to-adapt clauses, sample documents and checklists, including a goals and objectives questionnaire, forms for gifts of a life estate to a spouse, irrevocable minor's trusts, survivorship life insurance trust, standard will clauses, and complete wills with alternative clauses. Book #00539; looseleaf, two volumes, 1,864 pages; published in 1977, updated as needed; no additional charge for updates during your subscription. Looseleaf print subscribers receive supplements. The online edition is updated automatically. ISBN: 978-1-58852-002-9.