Wolters Kluwer

When you have to be right

The Estate Planning Expert Library from Wolters Kluwer

Treatises

Primary Content

Current Awareness

Tools

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.

The Estate Planning Expert Library provides expert guidance and treatises, primary materials, current awareness, and practice tools and forms all in one location.

Estate Planning and Drafting

- *The Complete Estate Planning Sourcebook* 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
- *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
- *Multistate and Multinational Estate Planning*, by Jeffrey A. Schoenblum — explores the legal aspects of individual wealth transfers across state and national boundaries

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 and Rounds: A Trustee's Handbook* edited by Charles E. Rounds, Jr. —the most convenient, reliable and complete source for trust advice

Contact us at 1-800-955-5217 to learn more. WoltersKluwerLR.com/Cheetah

Charitable Planning

- *Taxwise Giving*, by Conrad Teitell — a 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

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 longterm care planning advice, and more

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
- *Practitioner's Strategies* — columns written by noted estate planning practitioners on hot topics and emerging trends
- *Estate Planning Review — The Journal* — a monthly publication 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
- *IRS Actuarial Factors™* — instantly locates and returns the actuarial information you need
- *IntelliForms®* — access to interactive federal and state estate and gift tax forms and instructions
- Form 706 Applicable Credit Used in Prior Periods Calculator
- Form 709 Prior Years Credit Calculator