

Bna Income Tax Planner

Each year the most prominent authorities in the field come together at the Heckerling Institute on Estate Planning to discuss and analyze the most important developments in the areas of estate planning and estate, gift, and income taxation. Now in its fifth year, the Heckerling Institute is widely regarded as the premier estate planning program in the country. This one-volume publication provides cutting-edge articles based on the podium lectures delivered at the Heckerling Institute. Hot topics for this year's Institute include: Review of Estate Planning Developments • IRC Section 199A • Powers of Appointment • Charitable Giving

This popular manual covers all facets of basic estate planning. Tax and accounting issues, ethical issues, and problems related to specific forms of ownership and special classes of persons are examined. Homestead considerations and handling of assets acquired by community property jurisdictions are also featured. Basic Estate Planning In Florida, 9th Edition, provides an update of statutes, federal rules, and case law addressing the following (among other) aspects of estate planning: Tax apportionment and elective spousal portability elections; Effect of marital agreements and waivers; Powers of appointment; Community property rights; Creditors and the homestead exemption; Split dollar plans and required minimum distributions; Durable powers of attorney and the authority of successors; and Estate planning that constitutes the unlicensed practice of law.

State Income Taxation of Trusts

Directory of Business and Financial Information Services

Asset Depreciation Range (ADR) System

Real Estate Financing

Managing Your Tax Season, 3rd Edition

Is tax season at your firm a head-long scramble to the finish line? Do you want to start your next tax season with a system that reflects thoughtful planning and training? Get fresh insight into tax preparation—and very likely result in significant improvements to your current system. You will learn to analyze your existing tax season system and target problems so that work will be more efficient, errors will decrease, and personnel, including you, will feel less stressed. Most importantly, a well-run tax season will make your clients happier and more loyal. Every firm has a tax season system, whether documented or not. Tax season management expert Edward Mendlowitz shares specific ideas for improving each aspect of your system, including how to Staff creatively with seasonal staff, interns, and by outsourcing Maximize the effectiveness of the tax organizers you send to clients Communicate effectively with clients about the value of your service Use pre-year-end planning to develop tax and financial planning opportunities Empower your preparers to do more return work Make reviews run smoothly Conduct a post-tax season assessment of your process Bill for the real value of your return preparation—and even increase your fees Numerous sample checklists, letters, charts, and Excel tax comparison worksheets will help you implement this guidance in your next tax season. Having a world-class tax department is possible for every firm, and this resource will help you make that goal a reality. Topics Discussed: Improving tax season system Tax return preparation processes Managing seasonality issues Staffing solutions Getting the most out of technology Year-end planning for tax clients Staff tax training program Assignment scheduling Client appointments Preparation and review Billing Determining fees E-filing Extensions Tax audits Client satisfaction, retention and referrals

"... provides detailed coverage of the rules governing the income taxation of estates, trusts, and their beneficiaries"--Page iii.

Strategic Finance

The CPA Journal

Financial Planning for CPAs

PC Mag

Income Taxation of Trusts and Estates

Real Estate Financing contains over 40 deal-specific forms and checklists online, covering everything from complex loan workouts to simple residential closings. The forms include information about each term and how it can be modified, with separate variations for lenders, borrowers or other parties. A "Data Input Sheet" lets you use the forms with widely available software and can serve as a "term sheet" for the transaction. The accompanying volume provides explanations of the issues along with the guidance you need to draft working documents quickly. Real Estate Financing includes: checklists for loan modifications; wraparound mortgage loans; subordinations; loans secured by condos, co-ops and time shares; sale-leasebacks; contingent interests; securitizations; deeds in lieu and consensual foreclosures; participations; installment sales; sales of mortgage loans; and much more. The checklists highlight "deal" terms, flag risks and hot issues, and direct users, through cross-references, to alternative approaches and analysis. Standards issued by ratings agencies for securitized loans are discussed in detail, as are the EPA and ASTM standards for Phase I environmental reports and the best Web sites for forms and drafting requirements. Book ? looseleaf, one volume, 1,550 pages; published in 1997, updated as needed; no additional charge for updates during your subscription. Looseleaf print subscribers receive supplements. The online edition is updated automatically. ISBN: 978-1-58852-076-0.

"Jeff Rattiner has found another way to help producers. This book is a must-have for financial advisors, especially those that aspire to be Million Dollar Producers." -Thomas B. Gau, CPA, CFP President and CEO of Million Dollar Producer "Jeff Rattiner has done it again! His book displays all the essential tools and techniques necessary for advanced planners to succeed in this business. Rattiner's easy-to-read style provides the best in marketing and practice management ideas. This book will help you if you have hit a dead end in your practice. Rattiner tells it like it is by providing a no-nonsense approach to truly taking your practice to the next level. A must-read for the serious financial advisor." -Jim Cannon, President, SunAmerica Securities, Sentra Securities Corporation, and Spelman & Co., Inc. Financial planners provide a variety of services to an array of clients but lack a uniform system for creating a profitable business. Rattiner's Financial Planner's Bible: The Advisor's Advisor collects best practices from the nation's leading financial planners, presenting a prototype turnkey model for achieving financial success for both the client and the practice. Financial planning expert Jeffrey Rattiner emphasizes an ethical, practical approach to financial advising, placing paramount importance on "doing what's best for the client." Drawing on extensive interviews and his own experience, Rattiner delivers can't-miss tips on marketing a financial planning practice, developing an infrastructure, crafting strategic alliances, assessing a business's profitability, and creating the model twenty-first-century practice. This authoritative guide also covers: * Forming a planning advisory board * Establishing a realistic chain of command * Delegating responsibility * Making technology work for you * Charging clients appropriately Running a financial planning business need not be an exercise in trial and error. Rattiner's Financial Planner's Bible delivers a compelling model for advising success.

Bowker's Law Books and Serials in Print

The Advisor's Advisor

CD-ROMs in Print

Taxation for Accountants

The Tools & Techniques of Income Tax Planning

"... explains the federal taxation of property transfers made by U.S. resident non-citizens and nonresident non-citizens and their respective estates. The primary focus is on the rules applicable to nonresident non-citizens and transfers between a nonresident non-citizen or his or her estate and another nonresident non-citizen"--Portfolio description (p. iii).

With the passage of the SECURE Act in late 2019 and the recent COVID-19 legislation, financial advisors, planners, and insurance professionals are in need of up-to-date, reliable tools and expert insights into income tax planning techniques. Every area of tax planning covered in this book is accompanied by the tools and techniques you can use to: Help your clients successfully navigate the latest income tax rules and regulations; Quickly simplify the tax aspects of complex planning strategies; and Confidently advise your individual clients as well as small- and medium-size business owners. New in the 7th Edition: New chapters on the SECURE Act and COVID-19 legislation Details on IRS an DOL regulatory changes Updated advice on retirement planning issues, including COVID-19 hardship distributions, changing RMD requirements, and new contribution rules Coverage of new rules eliminating the "stretch IRA" and planning advice to help clients meet their estate planning goals Litigation updates Topics Covered: SECURE Act and COVID-19 legislation HSA eligibility Contribution limitations HSA deductions Tax reporting Employer contributions Comparability testing Testing periods Use by self-employed individuals HRAs and FSAs And more! See the "Table of Contents" section for a full list of topics As with all the resources in the highly acclaimed Leimberg Library, every area covered in this book is accompanied by the tools, techniques, practice tips, and examples you can use to help your clients successfully navigate the complex course of income tax planning and confidently meet their needs.

The Tools and Techniques of Income Tax Planning, 7th Edition

Managing Foundations and Charitable Trusts

The Software Encyclopedia

Comprehensive Volume

U.S. Tax Treaties

Plan ahead: estate planning to secure your wishes Estate Planning is your overview of the estate planning concepts that are necessary to consider when advising your clients about the different facets of wealth transfer planning. This fundamental reference presents the basic estate, gift, and trust planning ideas in a descriptive and accessible manner—allowing you to easily and conveniently access the information you need when you need it. This essential text covers the development of estate planning strategies for your clients, the fundamentals of the federal transfer tax system, relevant federal income tax rules, lifetime donative asset transfers, gratuitous property transfers at death, generation-skipping transfers, special property transfer planning considerations, and post-mortem planning. When done effectively, estate planning enables your clients to make both lifetime and testamentary transfers of assets to beneficiaries of their choice. In the process, strategic, successful estate planning strategies conserve wealth for these beneficiaries, who are often family members of the client. Leveraging the right methods of estate planning can ensure that you achieve your client's objectives. Explore the fundamentals of estate planning as they relate to wealth transfer planning Dive into special property transfer planning considerations, including community property, life insurance, charitable transfers, closely held corporations, etc. Better serve your clients by having access to relevant, easy to navigate information on estate planning best practices Reinforce these new ideas with a comprehensive test bank Estate Planning is your guide to estate planning concepts that help you protect your assets during wealth transfer—and prepare for your assets to change hands as smoothly as possible. The insider's guide to charitable organizations for donors and their advisors Do you know when to use a private foundation, a donor-advised fund, or a charitable remainder trust or other charitable vehicle? Do you know the different tax benefits, limitations, and control rules for each alternative? Do you have an appropriate investment policy for your endowed charities? Do you have a rubric for avoiding fraud? Do you know what to look for to make sure that your charitable donations don't do the opposite of what you intend? In Managing Foundations and Charitable Trusts, Roger D. Silk and James W. Lintott provide a comprehensive guide for charitable donors and their advisers. Additional topics include: Foundation Governance When to seek additional professional help When and how to turn a CRT interest into cash Key tax issues Creating a legacy Why tax planning is so difficult, and how to approach it Straightforward and authoritative, Managing Foundations and Charitable Trusts is a handy, easy-to-read guide that all donors and their advisers will want to keep on hand.

Rattiner's Financial Planner's Bible

West's Federal Taxation

Basic Estate Planning In Florida

Technology Tools for Today's High-Margin Practice

53rd Annual Heckerling Institute on Estate Planning

CD-ROM contains: Partners for Windows, a companion personal financial planning software -- Electronic forms from selected chapters.

Features software products from the Bureau of National Affairs, Inc. (BNA) Software, a division of Tax Management Inc. BNA publishes software for accountants, lawyers, financial planners, and other tax professionals in the areas of income tax planning, estate tax planning and compliance, corporate tax and corporate foreign tax credit planning, sales tax compliance, and fixed asset depreciation reporting and management. Describes DOS and Windows software, including Income Tax Planner and 706 Preparer. Offers access to downloadable versions of the software. Contains a FAQ section and ordering information. Links to the home pages of BNA and Tax Management Inc.

Essential Knowledge, Tools, and Techniques for Donors and Advisors

How Client-Centered Financial Advisors Can Cut Paperwork, Overhead, and Wasted Hours

Legal Looseleaves in Print

Creative Computing

Wall Street Computer Review

PCMag.com is a leading authority on technology, delivering Labs-based, independent reviews of the latest products and services. Our expert industry analysis and practical solutions help you make better buying decisions and get more from technology.

The ABA Journal serves the legal profession. Qualified recipients are lawyers and judges, law students, law librarians and associate members of the American Bar Association.

Income Averaging

Estate Planning

June 1971

Directory of Trust Institutions

Non-citizens—estate, Gift and Generation-skipping Taxation

Revolutionize your financial advisory practice with the latest cutting-edge tools Tired of spending more time with filing cabinets than with clients? Is overhead eating up your margins? In a new revised edition of the "bible" of practice management and technology for financial professionals, two leading financial planners, with some help from their friends*, deliver the knowledge advisors have been begging for. This book serves up a nontechnical trove of technology, clever workarounds, and procedural efficiencies tailored to help financial advisors in private practice move toward today's virtual office. The authors show you how to drastically reduce the paperwork in your office, slash overhead, and find anything you need in seconds using the latest software. This revised edition includes new information on SaaS and cloud computing, software integrations, mobile devices/apps, social media tools, portfolio accounting and outsourcing, collaborative tools, digital signatures, workflow management, marketing technology and much more. Perfect for successful practices seeking greater efficiencies and healthier profit margins The authors are well-known financial advisors, each with more than 30 years of experience in financial services Addresses the evolution of the virtual office and its impact on advisory firms If you're looking for new systems and efficiencies to transform and streamline your private practice, look no further than Technology Tools for Today's High-Margin Practice. *Chapter 1 Selecting the Right CRM System, Davis D. Janowski Chapter 2 The Future of Financial Planning Software, Bob Curtis Chapter 3 The Future of Financial Planning Software and the New Client-Advisor Relationship, Linda Strachan Chapter 4 Portfolio Management Software, Mike Kelly Chapter 5 Achieving Growth and Profitability with Technology Integration, Jon Patullo Chapter 6 How the World Wide Web Impacts the Financial Advisor, Bart Wisniewski Chapter 7 Managing Your Online Presence, Marie Swift Chapter 8 Client Portals and Collaboration, Bill Winterberg Chapter 9 The Cloud, J. D. Bruce Chapter 10 Digital Signature Technology, Dan Skiles Chapter 11 Innovative Software and Technologies Implemented at One of the United States' Leading Advisory Firms, Louis P. Stanasolovich Chapter 12 Virtual Staff Sparks Growth, Profitability, and Scalability, Jennifer Goldman Chapter 13 ROI—The Holy Grail of the Technology Purchase Decision, Timothy D. Welsh Chapter 14 Building an Efficient Workflow Management System, David L. Lawrence

"Managing state income tax liability is a critical aspect of planning and administering a trust. If done properly, the planner may provide substantial benefits to the beneficiaries. If done poorly, the trust may be subjected to significant cost. Tax Management Portfolio 869, State Income Taxation of Trusts, covers how all 50 states and the District of Columbia tax trust income, how tax often may be avoided, how substantial the potential tax savings are, and why a trustee might be surcharged for failing to take steps to avoid tax"--Portfolio description.

Bureau of National Affairs, Inc.: Software

The Tools and Techniques of Financial Planning

Individual Income Taxes

Dow Jones Investment Advisor

Eight Steps to a Proper Florida Trust and Estate Plan