

Checkpoint - Estate Planning Sources

All Estate Planning Sources

- Accounting and Reporting for Estates and Trusts
- Actions on Decisions (1967 - Present)
- Advance Notices of Proposed Rulemaking & Treasury Decisions
- American Federal Tax Reports (1860 - 2002)
- American Federal Tax Reports (Current Year)
- Analysis - Estate Planning
- Complete Analysis of the Heartland, Habitat, Harvest, and Horticulture Act of 2008
- Complete Analysis of the Heroes Earnings Assistance and Relief Tax Act of 2008
- Complete Analysis of the Economic Stimulus Act of 2008
- Complete Analysis of the AMT Patch, Mortgage Relief, Energy, Technical Corrections, and Other Late 2007 Tax Acts
- Complete Analysis of the Tax Provisions of the Medicare Act of 2003
- Complete Analysis of the Victims of Terrorism Tax Relief Act of 2001
- Complete Analysis of the Economic Growth and Tax Relief Reconciliation Act of 2001
- Complete Analysis of the Community Renewal Tax Act of 2000, the Installment Tax Correction Act of 2000, and the FSC Repeal Act of 2000
- Analysis of Tax and Trade Relief Extension Act of 1998
- Analysis of IRS Restructuring and Reform Act of 1998
- Analysis of Taxpayer Relief Act of 1997
- Analysis of the Small Business, Health Insurance and Welfare Reform Acts of 1996
- Analysis of the Small Business
- Annotations (Code Arranged - Estate Planning)
- Announcements (1959 - Present)
- BNA Daily Tax Report™
- Begley, Jr. & Hook/Representing the Elderly or Disabled Client: Forms and Checklists with Commentary
- Bellatti / Estate Planning for Farms and Other Family-Owned Businesses
- Bogdanski / Federal Tax Valuation
- Business Entities (WG&L)
- Charitable Giving Strategies
- Checklists (Planning & Administration)
- Code
- Code History
- Colliton / Charitable Gifts, 3rd Edition
- Committee Reports (Code Arranged - USTR)
- Complete Analysis of the Latest 2002 Tax Legislation

- Complete Analysis of the Job Creation and Worker Assistance Act of 2002
- Complete Analysis of the Victims of Terrorism Tax Relief Act of 2001
- Complete Analysis of the Economic Growth and Tax Relief Reconciliation Act of 2001
- Delegation Orders (1956 - Present)
- Disclosure Litigation Bulletins & Other IRS Documents
- Esperti & Peterson / Irrevocable Trusts: Analysis With Forms
- Estate Planners Alert Newsletter
- Estate Planning Journal (WG&L)
- Estate Tax Treaties
- Executive Orders
- Explanations (Code Arranged - Estate Planning)
- Family Partnerships
- Field Service Advice
- Filled-In IRS Forms
- Final & Temporary Regulations
- Frolik & Brown / Advising the Elderly or Disabled Client Second Edition
- Frolik / Residence Options for Older or Disabled Clients
- General Counsel Memoranda (1962 - Present)
- General Explanation of Tax Legislation Enacted in 1997 (Blue Book)
- General Explanation of Tax Legislation Enacted in 1998 (Blue Book)
- General Explanation of Tax Legislation Enacted in the 104th Congress '96 (Blue Book)
- Harrington & Zaritsky / Generation-Skipping Transfer Tax 2nd Edition
- Henkel / Estate Planning and Wealth Preservation: Strategies and Solutions
- Howard Zaritsky's Estate Planning Update
- IR News Releases
- IRS Publications
- Instructions for IRS Forms
- Kasner / Post Mortem Tax Planning 3rd Edition
- Life Insurance Strategies
- Madden / Tax Planning for Highly Compensated Individuals 3rd Edition
- New Law Special Study
- Notices (1980 - Present)
- Peschel & Spurgeon / Federal Taxation of Trusts
- Grantors and Beneficiaries 3rd Edition
- Planning Articles
- PLI's International Tax and Estate Planning: A Practical Guide for Multinational Investors
- PLI's International Tax and Personal Planning – Current Year
- PLI's International Tax and Estate Planning – Archive
- Pond / Personal Financial Planning Handbook: With Forms & Checklists 2nd Edition

- PPC'S 1041 Deskbook
- PPC'S 706/709 Deskbook
- Practical Estate Planning
- Preambles to Final and Temporary Regulations (Treasury Decisions)
- Preview: Business Entities (WG&L)
- Preview: Estate Planning Journal (WG&L)
- Preview: Valuation Strategies (WG&L)
- Private Letter Rulings & Technical Advice Memoranda (1953 - Present)
- Proposed Regulations & Preambles
- RIA Tax Watch
- Real Estate Taxation
- Revenue Procedures (1955 - Present)
- Revenue Rulings (1954 - Present)
- Sample Client Letters
- Sample IRS Correspondence
- Sample Will & Trust Forms & Clauses
- Service Center Advice
- Spero/Asset Protection: Legal Planning
- Strategies and Forms
- State Summaries (Estate Gift & Inheritance Taxes)
- Stephens, Maxfield, Lind & Calfee / Federal Estate and Gift Taxation 7th Edition
- Streng & Davis/ Retirement Planning: Tax and Financial Strategies 2nd Edition
- Streng / U.S. International Estate Planning
- Tax Court & Board of Tax Appeals Memorandum Decisions (1924 - 2002)
- Tax Court & Board of Tax Appeals Reported Decisions (1924 - 2002)
- Tax Court Memorandum Decisions (Current Year)
- Tax Court Reported Decisions (Current Year)
- Tax Planning and Practice Guides (Special Studies)
- Uniform Probate Code
- Uses and Taxation of Trusts
- Valuation Strategies (WG&L)
- Westfall & Mair / Estate Planning Law and Taxation, 4th Edition
- Zaritsky & Aucutt / Structuring Estate Freezes: Analysis With Forms 2nd Edition
- Zaritsky, Lane & Danforth / Federal Income Taxation of Estates and Trusts, 3rd Edition
- Zaritsky & Leimberg / Tax Planning with Life Insurance: Analysis With Forms Second Edition
- Zaritsky, Aghdami & Mancini / Structuring Buy-Sell Agreements: Analysis With Forms Second Edition

- Zaritsky / Tax Planning for Family Wealth Transfers: Analysis With Forms 3rd Edition

Analysis, Annotations, Explanations, and Planning Articles (Estate Planning)

- Analysis - Estate Planning
- Annotations (Code Arranged - Estate Planning)
- Explanations (Code Arranged - Estate Planning)
- Planning Articles
- State Summaries (Estate, Gift & Inheritance Taxes)

Code, Committee Reports, Regulations

- Advance Notices of Proposed Rulemaking & Treasury Decisions
- Code
- Code History
- Committee Reports (Code Arranged - USTR)
- Final & Temporary Regulations
- Preambles to Final and Temporary Regulations (Treasury Decisions)
- Proposed Regulations & Preambles

Complete Analysis of New Law

- Complete Analysis of the Heartland, Habitat, Harvest, and Horticulture Act of 2008
- Complete Analysis of the Heroes Earnings Assistance and Relief Tax Act of 2008
- Complete Analysis of the Economic Stimulus Act of 2008
- Complete Analysis of the AMT Patch, Mortgage Relief, Energy, Technical Corrections, and Other Late 2007 Tax Acts
- Complete Analysis of the Tax Provisions of the Medicare Act of 2003
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- Complete Analysis of the Economic Growth and Tax Relief Reconciliation Act of 2001
- Complete Analysis of the Community Renewal Tax Act of 2000, the Installment Tax Correction Act of 2000, and the FSC Repeal Act of 2000
- Analysis of Tax and Trade Relief Extension Act of 1998
- Analysis of IRS Restructuring and Reform Act of 1998
- Analysis of Taxpayer Relief Act of 1997
- Analysis of the Small Business, Health Insurance and Welfare Reform Acts of 1996

Estate Tax Treaties

- Estate Tax Treaties

Federal Tax Cases

- American Federal Tax Reports (1860 - 2005)
- American Federal Tax Reports (Current Year)
- Tax Court & Board of Tax Appeals Memorandum Decisions (1924 - 2005)
- Tax Court & Board of Tax Appeals Reported Decisions (1924 – 2005)
- Tax Court Memorandum Decisions (Current Year)
- Tax Court Reported Decisions (Current Year)

Indexes (Estate Planning)

- Current Code Topic Index
- Estate Planning Analysis Topic Index
- Final & Temporary Regulations Topic Index
- Proposed Regulations Topic Index

IRS Publications, Rulings, Releases

- Actions on Decisions (1967 - Present)
- Announcements (1959 - Present)
- Chief Counsel Advice
- Delegation Orders (1956 - Present)
- Disclosure Litigation Bulletins & Other IRS Documents
- Executive Orders
- Field Service Advice
- General Counsel Memoranda (1962 - Present)
- IR News Releases
- IRS Publications
- Notices (1980 - Present)
- Other FOIA (Freedom of Information Act) Documents
- Private Letter Rulings & Technical Advice Memoranda (1953 - Present)
- Revenue Procedures (1955 - Present)
- Revenue Rulings (1954 - Present)
- Service Center Advice

Newsletter & Journal (Estate Planning)

- Business Entities (WG&L)
- Estate Planners Alert Newsletter
- Estate Planning Journal (WG&L)
- Howard Zaritsky's Estate Planning Update

- Preview: Business Entities (WG&L)
- Preview: Estate Planning Journal (WG&L)
- Preview: Valuation Strategies (WG&L)
- Real Estate Taxation
- Valuation Strategies (WG&L)

PLI Publications

- PLI's International Tax and Estate Planning: A Practical Guide for Multinational Investors
- PLI's International Tax and Personal Planning – Current Year
- PLI's International Tax and Estate Planning – Archive

PPC's Estate & Trust Library

- 1041 Deskbook
- 706/709 Deskbook
- Accounting and Reporting for Estates and Trusts
- Charitable Giving Strategies
- Family Partnerships
- Life Insurance Strategies
- Practical Estate Planning
- Uses and Taxation of Trusts

Practice Aids & Special Studies (Estate Planning)

- Checklists (Planning & Administration)
- Estate and Gift Tax Handbook
- Filled-In IRS Forms
- Instructions for IRS Forms
- Sample Client Letters
- Sample IRS Correspondence
- Sample Will & Trust Forms & Clauses
- Tax Planning and Practice Guides (Special Studies)
- Uniform Probate Code

Tax Legislation (Blue Books)

- General Explanation of Tax Legislation Enacted in 108th 2004 (Blue Book)
- General Explanation of Tax Legislation Enacted in 107th Congress 2002 (Blue Book)
- General Explanation of Tax Legislation Enacted in 106th Congress 1999 (Blue Book)

- General Explanation of Tax Legislation Enacted in 105th Congress 1998 (Blue Book)
- General Explanation of Tax Legislation Enacted in the 104th Congress '96 (Blue Book)
- General Explanation of Tax Legislation Enacted in the 105th Congress '96 (Blue Book)
- General Explanation of Tax Legislation Enacted in the 106th Congress 2000 (Blue Book)

WG&L Estate Planning Treatises

- Begley, Jr. & Hook/Representing the Elderly or Disabled Client: Forms and Checklists with Commentary
- Bellatti / Estate Planning for Farms and Other Family-Owned Businesses
- Bogdanski / Federal Tax Valuation
- Colliton / Charitable Gifts, 3rd Edition
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Checkpoint Federal Archives

2008

- Annotations (as of 12/31/2008)
- Explanations (as of 12/31/2008)
- Internal Revenue Code (as of 12/31/2008)

2007

- Federal Tax Handbook (as of 10/31/2007)

2005

- Annotations (as of 12/31/2005)

2004

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- Federal Tax Handbook (as of 10/31/2004)

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2005 Federal Archives

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2004 Federal Archives

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