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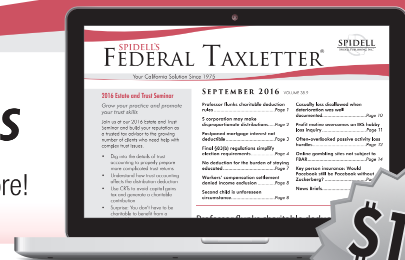

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Timely issues

- Uncover tax and financial issues when unmarried couples live together
- Prepare your client and family for financial effects of possible future dementia with our client letter
- Compare equitable ownership cases
- Crowdfunding, Uber, and AirBnB — how it works and how it's taxed

Trusts

- Use articles and special reports to help your clients decide whether they need a trust
- Understand A/B trusts, special needs trusts, principal residence trusts, charitable trusts, and more
- Find out how to select a trustee and what it means to be one

New laws

- Get more than an analysis of new laws: Use examples to help understand them
- Read our report on the new information return requirements for estates to report basis of assets
- Search archived issues to research not-so-new laws

Retirement planning

- Help your client plan for RMDs, using the new QLAC and IRA-to-charity
- Cut taxes and grow retirement savings with a defined benefit plan when contemplating a business sale
- Consider Roth conversions and use our client letter to help your client understand

Social Security and Medicare planning

- Use our Social Security special report to plan for the maximum amount of Social Security
- Properly advise your client who wants to gift the house and go on Medi-Cal
- Reduce or eliminate tax on lump sum Social Security payments

Gifting and estate planning

- Use client letters to advise your clients about adding a child's name to the house and warn them about famous estate planning nightmares
- Search back issues for info on charitable gifting to cut income and estate tax

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  - Forming, operating, and closing an LLC or a corporation
  - Charitable contributions
  - Long-term care
  - And many more

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- Help your client with steps to take when a loved one dies
- Use a client letter to offer condolences and warn what not to do

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