ESTATE PLANNING ON CHECKPOINT®

TOP 5 REASONS TO TRY ESTATE PLANNING ON CHECKPOINT®

1. Complete primary source material – codes, regulations, revenue rulings and procedures, cases, treatises, PLRs, TAMs, GCMs and more.
2. Over 20 exclusive WG&L treatises – covers the most authoritative analysis available and provides estate planning techniques to use for your client's best advantage.
3. Practice aids – such as sample will and trust forms and clauses, checklists, client letters and IRS correspondences to streamline your business.
4. In-depth comprehensive analysis – with citations and links to all controlling and relevant authorities.
5. Updates on new developments – with Estate Planning Alert newsletter, Howard Zaritsky's Estate Planning Update eNewsletter and the Estate Planning journal.

WG&L®, PPC® and RIA® experts provide the most in-depth commentary and analysis to guide estate planning professionals from plan development to drafting and administration of the final estate. The Warren, Gorham and Lamont (WG&L) treatises and journals are the definitive resource for strategies and insights written by some of the nation's leading experts in estate planning, such as renowned author Howard M. Zaritsky

These products are good for professionals who: Plan, draft or administer estate plans or provide estate planning advice

ESTATE PLANNING FEATURES

CHECKPOINT WORKFLOW

Estate Planning Topic Index – Alphabetically indexed to the EP Analysis portion. Allows a choice of searching by index or with Checkpoint's powerful search engine.

"Top of Line" Links to WG&L Tax Treatises, Statutes, Explanations, Historical Notes, etc. – Find all of the WG&L Tax Treatises with analysis of any Code Section by using the WG&L Top of Line Links. No research is complete without it.

"Side Line" Links to WG&L Tax Treatises, Statutes, Explanations, Historical Notes, etc. – Dig deep and find all of the WG&L Tax Treatises with analysis of your Code Subsection by using the WG&L Side Line Links to WG&L treatises.

CURRENCY

RIA Estate Planner's Alert (WEPA) – A monthly newsletter keeps you up-to-date on important developments.

Howard Zaritsky's Estate Planning Update – Twice-monthly eNewsletter gives you an expert review of the latest estate planning developments impacting you and your clients, with links to additional sources for further reading.

Estate State Summaries – Allows a practitioner to see if a certain state imposes an estate or gift tax and how it may differ from federal law.

PRACTICE AIDS

Estate Forms and Legal Agreement and Clauses – Combines the expertise of RIA editors and WG&L authors including Howard M. Zaritsky, to create the best collection of Estate Forms and Legal Agreements. Provides the actual language needed in order to draft Wills and Trust agreements.

IRS Forms – Provides line by line explanations, prepared by RIA expert editors, on how to fill in forms 706 Federal Estate Tax Return, 709 Federal Gift Tax Return and 1041 Income Tax Return for Trusts or Estates.

Estate Planning Checklists – An estate planning questionnaire, plus checklists for implementing the plan and administration of the estate. Avoid missing any essential steps in the planning and administration process.

Estate Client Letters – Fully prepared letters to clients explaining how the practitioner can help the client utilize various tax savings and planning strategies. A practice building tool, it allows a practitioner to present an option to a client, with full supporting information. Both Estate & Gift related client letters, and Lifetime/ Financial Planning related letters are easily accessible.

Estate Sample IRS Correspondence – Includes templates for correspondence with the IRS regarding various recurring estate planning situations.

Form/Line Finder – This innovative tool takes you from a Form line right to the analysis you need to complete your compliance task quickly and accurately. Available for 706, 709 and 1041.

EXPERTISE AND GUIDANCE

The WG&L treatises provide in-depth authoritative analysis. The guidance from PPC provides practical solutions and the expertise from RIA offers insightful commentary and advice.

OTHER SOFTWARE IN ADDITION TO CHECKPOINT

zCalc – A software tool that integrates educational PowerPoint presentations with powerful spreadsheet capabilities to help you deliver the optimal plan for wealth preservation.

MAJOR PACKAGES IN THE ESTATE PLANNING PRODUCT LINE:

ESTATE PLANNING COMPLETE (WESPC)

- Estate Planning Library (as detailed in column 2)
- WG&L Estate Planning Treatises
  - *Waiting out EGTRRA's Sunset Period: Practical Planning While Congress Debates Estate Tax Repeal*, by Howard M. Zaritsky (WHZTL)
  - *Advising the Elderly or Disabled Client, Second Edition*, by Lawrence A. Frolik and Melissa C. Brown (WAED)
  - *Asset Protection: Legal Planning, Strategies & Forms*, by Peter Spero (WAPC)
  - *Charitable Gifts, Third Edition*, by JamesW. Colliton (WCHGE)
  - *Estate Planning & Wealth Preservation: Strategies and Solutions*, by Kathryn G. Henkel (WHIWE)
  - *Estate Planning for Farms and Other Family-Owned Businesses*, by Robert M. Bellatti and Shari L. West (WQFOB)
  - *Estate Planning Law & Taxation, Fourth Edition,* by David Westfall and George P. Mair WEPLT
  - *Federal Estate & Gift Taxation, Eighth Edition*, by Richard B. Stephens, Guy B. Maxfield, Stephen A. Lind, Dennis A. Calfee, and Robert B. Smith WSMEP
  - *Federal Income Taxation of Estates & Trusts, Third Edition*, by Howard M. Zaritsky and Norman H. Lane (WFIET)
  - *Federal Tax Valuation*, by John A. Bogdanski (WVALE)
  - *Federal Taxation of Trusts, Grantors & Beneficiaries, Third Edition*, by John L. Peschel and Edward D. Spurgeon (WUTPE)
  - *Generation-Skipping Transfer Tax: Analysis with Forms, Second Edition*, by Carol A. Harrington, Lloyd Leva Plaine and Howard M. Zaritsky (WGSTT)
  - *Irrevocable Trusts: Analysis With Forms,* by Robert A. Esperti and Renno L. Peterson (WIRTE)
  - *Personal Financial Planning Handbook, Second Edition*, by Jonathan D. Pond (WPFF)
  - *Post Mortem Tax Planning, Third Edition*, by Jerry A. Kasner (WPMPE)
  - *Representing the Elderly or Disabled Client: Forms and Checklists with Commentary*, by Thomas D. Begley, Jr., and Andrew H. Hook (WAEDF)
  - *Retirement Planning: Tax & Financial Strategies, Second Edition*, by William P. Streng and Mickey R. Davis (WTPRW)
  - *Structuring Buy-Sell Agreements: Analysis With Forms, Second Edition*, by Howard M. Zaritsky (WSBSA)
  - *Structuring Estate Freezes: Analysis With Forms, Second Edition*, by Howard M. Zaritsky and Ronald D. Aucutt (WSEF3)
  - *Tax Planning for Family Wealth Transfers: Analysis With Forms, Fourth Edition*, by Howard M. Zaritsky (WTPLF)
  - *Tax Planning for Highly Compensated Individuals, Third Edition,* by Robert E. Madden WTPHE
  - *Tax Planning with Life Insurance: Analysis With Forms, Second Edition*, by Howard M. Zaritsky and Stephan R. Leimberg (WTPLI)
  - *U.S. International Estate Planning*, by William P. Streng (WUEPE)

ESTATE PLANNING LIBRARY (WEPNT) SAME AS WESPC, WITHOUT TREATISES

- RIA's Estate Planning Analysis
- Code-Arranged Estate Planning Annotations and Explanations
- Howard Zaritsky's Estate Planning Update – a twice-monthly eNewsletter|
- Estate Planner's Alert – a monthly newsletter
- Estate and Gift Tax Treaties
- Estate State Summaries
- Estate Planning journal
- Estate Planning Practice Aids and Special Studies: Estate Planning guidance; Will & Trust Forms & Clauses; Estate filled-in forms and instructions; Estate checklists and client letters; Estate sample IRS correspondence; Uniform Probate Code
- e-Form RS: Complete – all IRS Federal and State Forms
- 706, 709 and 1041 Return Guides and Form/Line-finder - unparalleled IRS forms completion guidance
- Primary law

3/6/9 PACKAGES

Customize your estate planning research system – Purchasers of RIA's Estate Planning Library (WEPNT) can customize their treatise library at significant savings: choose any 3, 6 or 9 WG&L treatises along with the Estate Planning Library (WESPC) and save 20% on any 3, 30% on any 6 and 40% on any 9 treatises added.

ADD-ONS TO THE ESTATE PLANNING PACKAGES

- PPC's Estate and Trust Consultant
- PPC's Guide to Practical Estate Planning
- PPC's Estate and Gift Calculator

AWARD & ACCOLADES:

- 2008: Checkpoint was a finalist in the 2008 SIIA CODiE Awards in the Best Online Government Information Service category
- 2008: Checkpoint received an unequalled 5 out of 5 stars in EVERY category rated: Ease-of-Use/Search Routine, Content, Customization, Integration/Output, and Support & Updates
- 2007, 2006, 2005, 2004: Checkpoint receives a 5 STAR rating in The CPA Technology Advisor's review of tax research applications
- 2007, 2006: Checkpoint ranked among Top 100 Products 2007 and Top 100 Products 2006 – Accounting Today/WebCPA Annual Top 100 Products List
- 2004: Checkpoint Rated Top 5 in 2004 for tax research by CPA Magazine [June/July 2004]
- 2006: Checkpoint won the 2004 SIIA CODiE Award for Software Excellence
- 2004: Checkpoint was a finalist in the 2006 SIIA CODiE Awards in the Best Online Government Information Service and Best Online Newsletter categories.
- 2004: RIA won the CPA Wealth Provider's Second Annual Financial Planning Award of Excellence [December 2004]

Register for a complimentary product demonstration webinar

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or call toll-free 1-800-342-6288 ext. 5811

One Corporate Plaza, 2075 Kennedy Road, Toronto Ontario Canada M1T 3V4 | carswell.com | thomsonreuters.com

12853-E17063 MM2 05/09