



estate planning: looking at our world through income tax glasses

CalCPA | Estate Planning Committee

October 19, 2016
12pm-2pm

Allan Cutrow and Eva Wolf will give a presentation on "Estate Planning: Looking at Our World Through Income Tax Glasses" to members of CalCPA on October 19, 2016.

With lower estate tax rates and higher income tax rates, many traditional estate planning techniques result in only modest overall tax savings due to the income tax basis step-up lost when assets are moved out of clients' taxable estates. While most estate planners are aware of this issue, planners now must decide how to proceed with clients who have already transferred assets out of their taxable estates and with new clients who come for estate planning recommendations. Allan and Eva will cover how to rescue traditional plans undertaken before the change in the tax rates, when new client plans must take into account the lost basis step-up and when it is not relevant, and what newer planning alternatives may be available to avoid the income tax downside of moving assets out of the taxable estate to save estate taxes.

More Information

attorneys

Allan B. Cutrow

practice areas

tax and trusts & estates
tax planning
trusts & estates