The Estate Planning Expert Library™ is an exclusive estate planning resource that will assist you in all areas of your practice — from client counseling, research and planning, to drafting and compliance. It is organized into four modules.

Estate Planning and Drafting
- **Estate Planning**, by A. James Casner and Jeffrey N. Pennell — encyclopedic coverage of estate planning practice
- **Price on Contemporary Estate Planning**, by John R. Price and Samuel A. Donaldson — a core resource and reference tool covering the principal tenets of estate planning
- **Drafting the Estate Plan: Law and Forms**, by David A. Handler and Deborah V. Dunn — covers transfer tax and trust laws and examines the pitfalls and planning opportunities presented by the law
- **Multistate and Multinational Estate Planning**, by Jeffrey A. Schoenblum — explores the legal aspects of individual wealth transfers across state and national boundaries

Charitable Planning
- **Taxwise Giving**, by Conrad Teitell — a monthly newsletter on philanthropic topics, as well as tax law changes, planning techniques and tips
- **Outright Charitable Gifts**, by Conrad Teitell — comprehensive coverage on outright charitable gifts, including tax and reporting compliance rules for individuals, partnerships and corporations
- **Deferred Giving**, by Conrad Teitell — covers the income, gift, estate and capital gains tax implications of deferred giving techniques
- **Charitable Lead Trusts**, by Conrad Teitell — definitive explanation of charitable lead trusts and unitrusts, including sample trust agreements and forms
- **Planned Giving**, by Conrad Teitell — practice-oriented explanations of the tax rules for outright and deferred giving

Trust and Estate Administration
- **Income Taxation of Fiduciaries & Beneficiaries**, by Byrle Abbin — practice-focused discussion of the state law trust accounting rules and the federal income taxation of trusts and estates
- **Loring: A Trustee’s Handbook**, edited by Charles E. Rounds, Jr. — the most convenient, reliable and complete source for trust advice

Elder Law Planning
- **ElderLaw Report**, edited by Harry S. Margolis and Kenneth M. Coughlin — a monthly newsletter that keeps elder law planning professionals current on the trends and issues affecting senior clients
- **ElderLaw Portfolio Series**, edited by Harry S. Margolis and G. Thomas Bickford — leading elder law experts tell you what you need to know to meet the challenges of the evolving elder law practice
- **ElderLaw Forms Manual**, by Harry S. Margolis — practice-tested forms assist you in the representation of older clients and cover such areas as managing the elder law practice, estate and long-term care planning advice, and more
All Modules Include:

**Superior Content and Expert Guidance**
- Analytical content — ensures you have the right answers to your estate planning questions
- Guidance in key practice areas — assists you with client counseling, research, planning, drafting and compliance
- Complete primary source materials — including the Internal Revenue Code, Federal Tax Regulations, Cases, and Rulings and IRS Pubs. 448, 904, 950, 1457, 1458 and 1459

**Current News and Trends**
- *Tax Tracker News™* — our customizable news service, delivered daily via email and your own personalized web page
- Practitioner’s Strategies — columns written by noted estate planning practitioners on hot topics and emerging trends
- *Estate Planning Review — The Journal* — a monthly publication covering financial and estate planning trends and techniques to comply with the law

**Practice Tools and Aids**
- *CCH FinEst Calcs™* — automates and consolidates financial and estate planning calculations and provides graphical representation — in one product
- *Smart Charts™* — by selecting a list of topics, you can create a custom chart on various multistate issues, such as asset protection, estate administration and more
- Key Tax Rate Data — includes federal tables, rates and credits, and transfer tax compendiums for all 50 states and the District of Columbia
- *Estate Planning Client Letter Toolkit™* — letters and correspondence on estate planning topics and other issues related to transfer taxes
- *Estate Planning Election and Compliance Toolkit™* — prepares ready-to-file election and compliance statements on estate planning and related topics
- *Multistate Guide to Estate Planning* by Jeffrey A. Schoenblum — provides quick reference to the complex state rules governing various estate planning issues in easy-to-use chart format
- *Teitell’s Portable Planned Giving Manual*, by Conrad Teitell — covers all aspects of charitable giving, including sample documents and practice aids
- *IRS Actuarial Factors™* — instantly locates and returns the actuarial information you need
- IntelliForms® — access to interactive federal and state estate and gift tax forms and instructions
- Form 706 Applicable Credit Used in Prior Periods Calculator
- Form 709 Prior Years Credit Calculator

**Training and Consulting Options to Fit Your Needs**
CCH also offers valuable training, consulting and CPE to keep you ahead of the curve. From live training and consulting, to on-demand online learning, CCH provides the tools that everyone, from new hires to seasoned pros, needs to strengthen their abilities. Visit CCHGroup.com/Learning for more information.