
From: Amanda Kirby [REDACTED]
Sent: 7/1/2013 4:48:24 PM
To: Paul Morris [REDACTED]
Subject: Fw: Tax Topics
Attachments: Ben Pace.xlsx; jul01tx13.pdf; pic29358.gif; pic04463.gif

Classification: Public

I started putting together the distribution list for the Ben Pace emails. Could be good to send out Tax Topics, as well. Currently using the Pipeline as a guide for the initial distribution list. Attached here. I've gotten through about half in adding emails. We can go over tomorrow and I can send out a Tax Topics blast.

(See attached file: Ben Pace.xlsx)

----- Forwarded by Amanda Kirby/db/dbcom on 07/01/2013 04:46 PM -----

From: Blanche Christerson/db/dbcom
To:
Date: 07/01/2013 04:37 PM
Subject: Tax Topics

Classification: Public

This edition of Tax Topics discusses selected planning points in light of the now "permanent" (and ever-increasing) \$5 million exclusion against gift and estate taxes (it's now \$5.25 million) and "portable" spousal exclusions. It also discusses the potential impact of state estate taxes -- even for people who don't live in states like New York, New Jersey or Connecticut, but merely own property there. Finally, it has the July 7520 rate and applicable federal mid-term rates.

Happy Fourth of July to you!

(See attached file: jul01tx13.pdf)

(Embedded image moved to file: pic29358.gif)

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